C 47.15:976/1

SUMMARY AND ANALYSIS OF INTERNATIONAL TRAVEL TO THE U.S.

PENNSYLVANIA STATE UNIVERSITY
MAY 3 1976
DOCUMENTS COLLECTION

January 1976

Statistics on visitor arrivals to the U.S. and market analysis of international travel by residents of foreign countries

U.S. DEPARTMENT OF COMMERCE/UNITED STATES TRAVEL SERVICE/Research and Analysis Division

Analysis:

"Japanese International Travel Market 1975"

SUMMARY AND ANALYSIS

INTERNATIONAL TRAVEL TO THE U. S.

JANUARY 1976

Statistics on visitor arrivals to the U. S. and market analysis of international travel by residents of foreign countries.

UNITED STATES DEPARTMENT OF COMMERCE

UNITED STATES TRAVEL SERVICE

Research and Analysis

Division

U. S. Depository Copy

Digitized by the Internet Archive
in 2012 with funding from
LYRASIS Members and Sloan Foundation

http://archive.org/details/summarxxxxx00unit

TABLE OF CONTENTS

		Page
I.	Introduction	
	A. Purpose	1
	B. Objectives	1
	C. Methodology, Scope, Limitations	1
	D. Concluding Remarks	2
II.	Foreign Visitor Arrivals to the U. S.	3
	Highlights of Foreign Visitor Arrivals to the U. S. by Residence, and Mode of Transport - January 1976	4
	Table 1 - Arrivals to the U. S. January 1976	4
	Table 2 - Total Visitor Arrivals to the U. S. by Mode of Transport	5
	Table 3 - Foreign Visitor Arrivals in the U. S. by Geographic Area	6
	Table 4 - Top Ten Tourist Generating Countries	7
	Table 5 - Foreign Visitor Arrivals in the U. S. by Area of Residence and Month of Arrival	8
	Chart 1 - Foreign Visitor Arrivals by Region	9
III.	Highlights of Travel Between the U. S. and Canada	10
	Table 6 - Canadian Travelers Returning from the U. S. to Canada by Month and Cumulative to Date 1972-1976	12
	Table 7 - Canadian Travelers Returning from the U. S. to Canada by Type of Transportation 1972-1976	13
	Table 8 - Canadian Travelers Returning from the U. S. to Canada by Type of Transportation 1974-1976	16

Table of Contents (Continued)

Page

Table 9 - United States Travelers Entering Canada by Type of Transportation 1972-1976 17

Table 10-U. S. Travelers to Canada by Type of Transportation 1972-1976 20

IV. Analysis of the International Travel Market of Selected Countries - Analysis: "Japanese International Travel Market 1975" 21

Addendum 1 - Japanese Economic Environment 43

Addendum 2 - Summary: Japanese Traveler Characteristics 44

Addendum 3 - Map of Japan 46

APPENDICES

Appendix I - Temporary Visitors to the U. S. by Country or Region of Last Permanent Residence - January 1976 47

Appendix II -Temporary Visitors to the U.S. by Country or Region of Last Permanent Residence and Mode of Transport - January 1976 52

INTRODUCTION

A. PURPOSE

The United States Travel Service, in an effort to more effectively supply travel data to the industry, has prepared a monthly analysis of foreign visitor arrivals to the United States.

B. OBJECTIVES

Specifically, the report was designed to meet the following objectives:

(1) Assimilation of available travel market data from other U.S. Government agencies, government tourist offices of other countries and international travel associations.

(2) Analysis of statistical material highlighting trends and significant events.

C. METHODOLOGY, SCOPE, LIMITATIONS

(1) Foreign Visitor Arrivals to the U.S.

Data on arrivals are based upon Immigration and Naturalization Service tabulations of Forms I-94, a document which visitors to the United States are required to complete. In addition, tabulations of Forms SW-434 are included in the figures for Mexico so as to reflect all visitors from Mexico, excluding border crossers. Data on Canadian arrivals is provided by Statistics Canada.

The business category includes B-1 visa holders. The pleasure category includes B-2 visa holders. The transit category includes C-1 (aliens in transit) visa holders and C-4 (transit without visa) holders. The student group includes F-1 and F-2 (students and their families) visa holders. The categories reflect the definition of a "tourist" as defined by the official governmental tourist organization, the International Union of Official Travel Organizations and by the tourism committee of Organization for Economic Cooperation and Development.

(2) International Travel Market of Selected Countries

Data for this section are the result of many contributors, primarily international organizations such as the Organization for Economic Cooperation and Development (OECD), the International Union of Official Travel Organizations (IUOTO), the United States Travel Service (USTS) both here and abroad, and national tourist offices of various foreign governments. In addition, data from private industry studies on tourism are included in this publication.

D. CONCLUDING REMARKS

We hope that the users of this information will keep USTS informed of its usefulness. We would appreciate any comments on either the form or content of the data and any suggestions on how USTS might improve its data and analytical services to the industry.

FOREIGN VISITOR

ARRIVALS TO THE U. S.

Highlights of Foreign Visitor Arrivals to the U. S. -- January 1976

International travel to the U.S. from Canada, Mexico, and overseas countries was up during January 1976. Foreign arrivals numbered 1,020,961, representing a 5.1% increase over the January 1975 volume.

Table 1

Arrivals to the U. S.

January 1976

	January 1976	January 1975	% Change
Overseas	275,639	230,350	+19.7%
Mexico	108,878	159,793	(-31.9)
Canada	636,444	581,546	+ 9.4
TOTAL	1,020,961	971,689	+ 5.1

Visitor arrivals from overseas countries in January 1976 showed a significant 19.7% increase over the 1975 level. This monthly expansion in overseas arrivals was the result of the rise in travel from all major geographical world areas, with increases ranging from 10% for Asia to 66% for Oceania.

Significantly, travel from Europe during the first month of this Nation's Bicentennial birth-year was up a healthy 25% from the January 1975 volume--an encouraging sign in light of the 2% decline evidenced in arrivals from Europe during total CY 1975.

Travel to the U. S. from USTS' three major European market countries was also on the rise during January, with arrivals from the United Kingdom up 19.4% from West Germany, up 27.7% and up 38.5% from France.

Additionally, January saw foreign visitation increase from USTS' four European Special Market countries: Italy +35.6%; Switzerland, +54.7%; Netherlands, +28.7% and Belgium +41.2%.

During January 1976, Asian travel to the U. S. rose 10%. This increase occurred despite a relatively stable showing in traveler activity from Japan, the primary source of arrivals from Asia. Tourists from Japan were down 0.5% from the 1975 January level. It should be noted, however, that this month's travel performance represents somewhat of an improvement from the past three months (October through December 1975) when Japanese arrivals evidenced declines ranging from 6% to 31%.

Travel from Australia, a USTS Special Market country and the primary source of Oceanian arrivals, rose substantially during January--up 80.7%.

In addition, arrivals from USTS' two South American Special Market countries, Brazil and Venezuela, were also up substantially over the January 1975 totals--increasing markedly by 43.0% and 54.5%, respectively.

While travel from Mexico to the U. S. during January showed a significant decline of 31.9%, it is important to note that the volume of Mexican arrivals who visited this country in January 1975 was atypically high (up 50% over the January 1974 level). This fact perhaps explains the "poor" showing during the first month of 1976.

Canada, the predominant source of foreign arrivals to the U. S. supplied 636,444 visitors to the U. S. during January, representing a 9.4% increase over the January 1975 total.

Mode of Transport

As reflected in Table 2 below, 512,626 international arrivals traveled to the U. S. by land during January--representing a 50.2% share of the total market. Total air travelers to the U. S. equaled 498,498 recording a 48.8% share of the market, while visitors by sea totaled 9,837 and accounted for a share of less than ½ of 1%.

Due to the proximity of Canada and Mexico, arrivals from these two countries traveled to the U. S. by car while visitors from overseas countries traveled to the U. S. by air. Between 1975 and 1976 there was a slight shift in air and land travel to the U. S. More specifically, as a proportion of total travel, air travel increased nearly 4 percentage points from 45% in 1975 to 49% in 1976, while land arrivals declined nearly 4% during this same time period. Sea travel during these two time periods remained the same.

Overseas air arrivals increased 20%, and land arrivals increased 43% indicating an increasing number of travelers entering the U. S. from Canada or Mexico. Mexican air arrivals recorded a 46% increase, while land arrivals decreased 43.4%.

It is interesting to note that 46% of the sea arrivals to the U. S. for January came from Germany (1,595), the U. K. (1,534) and Venezuela (1,354). The proportion of sea travel to the total arrivals from Germany, the U. K., and Venezuela accounted for 11%, 6% and 15% respectively.

Table 2
Total Visitor Arrivals
to the U. S. by Mode of Transport
January 1976

	Air	Sea	Land	Total
Canada	209,790	152	426,502	636,444
Mexico	29,205	1,717	77,956	108,878
Overseas	259,503	7,968	8,168	275,639
Total	498,498	9,837	512,626	1,020,961

As reflected in Table 3 below, total arrivals to the U. S. during January 1976 increased .1% over January 1975. Significant increases, ranging from 10% to 66% were recorded for all of the major geographic areas with the exception of Mexico (-31.9%).

Arrivals from Europe accounted for 34% of the total overseas arrivals, while Asia and South America accounted for 30% and 15% of the overseas arrivals respectively.

During January, no sizable gains in the share of overseas arrivals were recorded.

Table 3

FOREIGN VISITOR ARRIVALS IN THE U. S. BY GEOGRAPHIC AREA

	January 1976			
AREA	Arrivals	Percent Change	Total Overseas	1975 Share of Total Overseas
Europe	93,330	25.0	33.9	32.4
South America	40,649	15.6	14.7	15.3
Central America	13,939	15.0	5.1	8.4
West Indies	22,697	17.7	8.2	8.4
Asia	82,757	10.0	30.0	32.7
Oceania	16,969	65.5	6.2	4.5
Africa	5,295	47.3	1.9	1.6
Other Overseas	3	100.0	0.0	0.0
Total Overseas	275,639	19.7	100.0	100.0
Mexico	108,878	-31.9		
Canada	636,444	9.4		
Grand Total	1,020,961	5.1		

Table 4 below indicates the top ten tourist generating countries to the U. S. during 1975 and 1976.

Canada, the number one generator of travel to the U. S. recorded a 9.4% increase in January, while Mexico reflected a decline of 31.9%. These two countries have traditionally generated at least 80% of the world travel to the U. S. in the last decade.

Japan, which ranked third in international travel to the U. S. declined 0.5%, followed by the United Kingdom (+19.4%), Germany (+27.7%) and Brazil (+43.0%).

Among the most dramatic increases, Australia recorded the highest (80.7%), followed by Venezuela (54.5%).

Table 4

TOP TEN TOURIST GENERATING COUNTRIES

JANUARY 1976

Country	January 1976 Rank	January 1976 Number of Arrivals	January 1975 Rank	January 1975 Number of Arrivals	% Change	1976 SHARE OF TOTAL ARRIVALS	1975 SHARE OF TOTAL ARRIVALS
Canada	1	636,444	1	581,546	9.4	62.3	59.8
Mexico	2	108,878	2	159,793	-31.9	10.7	16.4
Japan	3	60,907	3	61,205	- 0.5	6.0	6.2
U. K.	4	26,888	4	22,519	19.4	2.6	2.3
Germany	5	14,620	5	11,445	27.7	1.4	1.2
Brazil	6	13,918	6	9,735	43.0	1.4	1.0
Australia	7	12,922	9	7,152	80.7	1.3	0.7
France	8	11,905	7	8,597	38.5	1.2	0.1
Venezuela	9	9,129	11	5,908	54.5	0.9	0.1
Italy	10	8,035	10	5,925	35.6	0.8	0.1
Total Arrivals		1,020,961		971,689	5.1	100.0%	100.0%

Table 5

FOREIGN VISITOR ARRIVALS IN THE U.S.
(BY AREA OF RESIDENCE + MONTH OF ARRIVAL)

1975 + 1976

ARRIVALS FROM CANADA

MONTH	1975	1976	% CHG
JANUARY	581,546	636,444	9.4
FEBRUARY	455,780		
MARCH	863,346		
APRIL	679,655		
MAY	716,610		
JUNE	821,643		
JULY	1,538,154		
AUGUST	1,682,665		
SEPTEMBER	808,419		
OCTOBER	746,241		
NOVEMBER	561,280		
DECEMBER	460,288		
TOTAL	9,915,627		

ARRIVALS FROM MEXICO

MONTH	1975	1976	% CHG
JANUARY	159,793	108,878	-31.9
FEBRUARY	123,402		
MARCH	198,238		
APRIL	165,047		
MAY	156,105		
JUNE	172,698		
JULY	261,281		
AUGUST	219,377		
SEPTEMBER	148,445		
OCTOBER	145,739		
NOVEMBER	136,180		
DECEMBER	269,346		
TOTAL	2,155,651		

ARRIVALS FROM EUROPE

MONTH	1975	1976	% CHG
JANUARY	74,668	93,330	25.0
FEBRUARY	80,741		
MARCH	98,213		
APRIL	97,549		
MAY	115,071		
JUNE	174,521		
JULY	200,751		
AUGUST	155,606		
SEPTEMBER	138,300		
OCTOBER	138,911		
NOVEMBER	94,279		
DECEMBER	109,248		
TOTAL	1,477,858		

ARRIVALS FROM SOUTH AMERICA

MONTH	1975	1976	% CHG
JANUARY	35,172	40,649	15.6
FEBRUARY	36,118		
MARCH	27,012		
APRIL	25,479		
MAY	28,913		
JUNE	39,374		
JULY	56,611		
AUGUST	43,021		
SEPTEMBER	41,180		
OCTOBER	29,681		
NOVEMBER	26,950		
DECEMBER	41,604		
TOTAL	431,115		

ARRIVALS FROM CENTRAL AMERICA

MONTH	1975	1976	% CHG
JANUARY	12,126	13,939	15.0
FEBRUARY	8,674		
MARCH	10,089		
APRIL	8,056		
MAY	9,503		
JUNE	11,249		
JULY	11,957		
AUGUST	12,176		
SEPTEMBER	12,345		
OCTOBER	9,966		
NOVEMBER	14,686		
DECEMBER	17,187		
TOTAL	138,014		

ARRIVALS FROM WEST INDIES

MONTH	1975	1976	% CHG
JANUARY	19,277	22,697	17.7
FEBRUARY	18,583		
MARCH	21,359		
APRIL	21,981		
MAY	21,017		
JUNE	29,597		
JULY	43,565		
AUGUST	45,012		
SEPTEMBER	36,334		
OCTOBER	24,375		
NOVEMBER	23,470		
DECEMBER	33,114		
TOTAL	337,684		

ARRIVALS FROM ASIA

MONTH	1975	1976	% CHG
JANUARY	75,260	82,757	10.0
FEBRUARY	84,656		
MARCH	89,962		
APRIL	69,685		
MAY	67,294		
JUNE	94,363		
JULY	101,439		
AUGUST	120,701		
SEPTEMBER	90,008		
OCTOBER	74,969		
NOVEMBER	61,356		
DECEMBER	72,444		
TOTAL	1,002,137		

ARRIVALS FROM OCEANIA

MONTH	1975	1976	% CHG
JANUARY	10,252	16,969	65.5
FEBRUARY	11,008		
MARCH	9,373		
APRIL	14,129		
MAY	16,204		
JUNE	19,239		
JULY	19,752		
AUGUST	24,028		
SEPTEMBER	18,803		
OCTOBER	14,016		
NOVEMBER	9,840		
DECEMBER	18,103		
TOTAL	184,747		

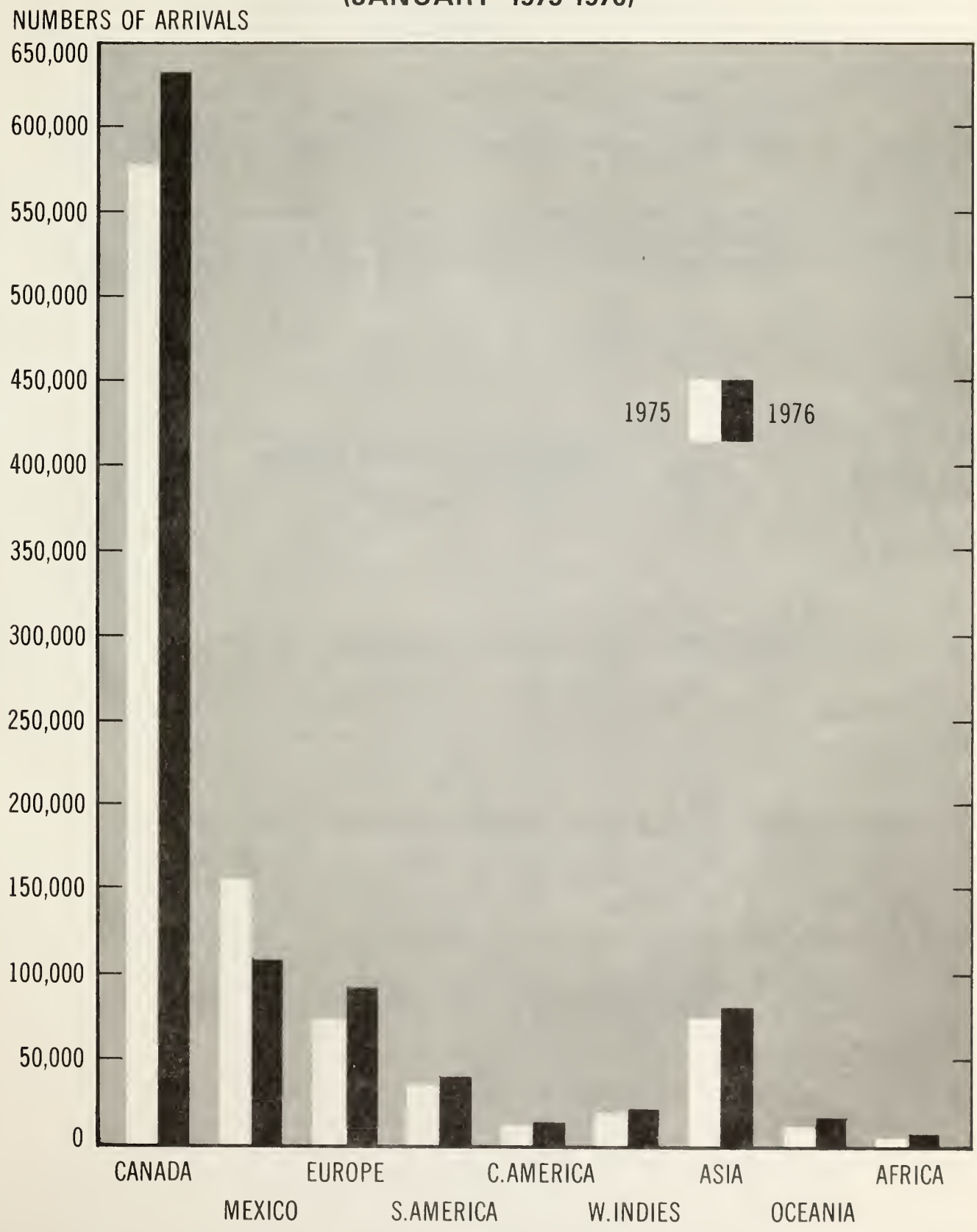
ARRIVALS FROM AFRICA

MONTH	1975	1976	% CHG
JANUARY	3,595	5,295	47.3
FEBRUARY	2,432		
MARCH	2,411		
APRIL	3,236		
MAY	4,102		
JUNE	5,762		
JULY	5,735		
AUGUST	8,064		
SEPTEMBER	6,586		
OCTOBER	4,177		
NOVEMBER	2,858		
DECEMBER	3,763		
TOTAL	52,721		

CHART 1

FOREIGN VISITOR ARRIVALS BY REGION

(JANUARY 1975-1976)



HIGHLIGHTS OF TRAVEL BETWEEN THE U. S. AND CANADA

Highlights of Travel Between the U. S. and Canada

During January 1976, the U. S. received 636,444 Canadian visitor arrivals, a gain of 9.4% over last January. Sixty percent of these Canadian arrivals came by automobile, while 33% came by air, 7% came by bus and less than ½ of 1% came by train.

U. S. citizen departure to Canada during January 1976 reached 322,903, representing a decline of 0.5%. Sixty-seven percent of the American departures to Canada were by automobile, while 24% departed by air and 7% by bus.

TABLE 6

CANADIAN TRAVELERS RETURNING FROM THE UNITED STATES TO CANADA BY MONTH AND CUMULATIVE TO DATE
1972-1976

	1972	1973	1974	1975	1976	% CHANGE 1972/1973	% CHANGE 1973/1974	% CHANGE 1974/1975	% Chg 75/76	SHARE OF TOTAL 1972	1973	1974	1975
JANUARY	452.456	483.721	430.681	581.546	636,444	+ 6.9%	- 11.0%	+ 35.0%	+9.4	5.1%	5.5%	5.0%	5.9%
CUMULATIVE TO JANUARY	452.456	483.721	430.681	581.546		+ 6.9	- 11.0	+ 35.0		5.1	5.5	5.0	5.9
FEBRUARY	377.738	403.134	362.553	455.780		+ 6.7	- 10.1	+ 25.7		4.3	4.6	4.2	4.6
CUMULATIVE TO FEBRUARY	830.194	886.855	793.234	1.037.326		+ 6.8	- 10.6	+ 30.8		9.4	10.1	9.2	10.5
MARCH	581.245	678.792	589.107	863.346		+ 16.8	- 13.2	+ 46.6		6.6	7.7	6.8	8.7
CUMULATIVE TO MARCH	1.411.439	1.565.647	1.382.341	1.900.672		+ 10.9	- 11.7	+ 37.5		16.0	17.8	15.0	19.2
APRIL	702.952	723.964	602.529	679.655		+ 3.0	- 16.8	+ 12.8		8.0	8.2	7.0	6.9
CUMULATIVE TO APRIL	2.114.391	2.289.611	1.984.870	2.580.327		+ 8.3	- 13.3	+ 30.0		24.0	26.0	22.9	26.0
MAY	641.624	630.927	582.205	716.610		- 1.7	- 7.7	+ 23.1		7.3	7.2	6.7	7.2
CUMULATIVE TO MAY	2.756.015	2.920.538	2.567.076	3.296.937		+ 6.0	- 12.1	+ 28.4		31.3	33.2	29.6	33.2
JUNE	675.394	678.461	731.780	821.652		+ 0.5	+ 7.9	+ 12.3		7.7	7.7	8.4	8.3
CUMULATIVE TO JUNE	3.431.409	3.598.999	3.298.856	4.118.589		+ 4.9	- 8.3	+ 24.8		38.9	40.9	36.1	41.5
JULY	1.590.381	1.462.393	1.419.846	1.538.154		- 8.0	- 2.9	+ 8.3		18.0	16.6	16.4	15.5
CUMULATIVE TO JULY	5.021.790	5.061.392	4.718.702	5.656.743		+ 0.8	- 6.8	+ 19.9		56.9	57.5	54.5	57.0
AUGUST	1.469.426	1.427.459	1.484.248	1.682.665		- 2.9	+ 4.0	+ 13.4		16.7	16.2	17.1	17.0
CUMULATIVE TO AUGUST	6.491.216	6.488.851	6.202.950	7.339.408		+ 0.0	- 4.4	+ 18.3		73.6	73.7	71.6	74.0
SEPTEMBER	797.911	808.003	819.106	808.419		+ 1.3	+ 1.4	- 1.3		9.0	9.2	9.5	8.2
CUMULATIVE TO SEPTEMBER	7.289.127	7.296.854	7.022.056	8.147.827		+ 0.1	- 3.8	+ 16.0		82.7	82.8	81.0	82.2
OCTOBER	687.188	673.719	699.899	746.241		- 2.0	+ 3.9	+ 6.6		7.8	7.6	8.1	7.5
CUMULATIVE TO OCTOBER	7.976.315	7.970.573	7.721.955	8.894.068		- 0.1	- 3.1	+ 15.2		90.5	90.5	89.1	89.7
NOVEMBER	438.104	456.041	477.173	561.270		+ 4.1	+ 4.6	+ 17.6		5.0	5.2	5.5	5.7
CUMULATIVE TO NOVEMBER	8.414.419	8.426.614	8.199.128	9.455.338		+ 0.1	- 2.7	+ 15.3		95.4	95.7	94.6	95.4
DECEMBER	403.899	382.110	465.697	460.288		- 5.4	+ 21.9	- 1.2		4.5	4.3	5.4	4.6
CUMULATIVE TO DECEMBER	8.818.318	8.808.724	8.664.825	9.915.626		- 0.1	- 1.6	+ 14.4		100.0	100.0	100.0	100.0
TOTAL	8.818.318	8.808.724	8.664.825	9.915.626						100.0	100.0	100.0	100.0

SOURCE: United States Travel Service based on data from Statistics Canada, Travel Between Canada and Other Countries: 1973, Catalogue 66-001 Monthly.

TABLE 7

CANADIAN TRAVELERS RETURNING FROM THE US TO CANADA BY TYPE OF TRANSPORTATION
1972-1976

	TOTAL	% CHANGE	JANUARY	% CHANGE	FEBRUARY	% CHANGE	MARCH	% CHANGE	APRIL	% CHANGE	MAY	% CHANGE	JUNE	% CHANGE
AUTOMOBILE														
1972	7,026,711		303,572		253,711		401,263		528,234		504,200		534,353	
1973	6,741,007	- 4.1	307,600	+ 1.3	251,693	- 0.8	471,984	+ 17.6	535,565	+ 1.4	481,263	- 4.5	517,476	- 3.2
1974	6,275,342	- 6.9	225,901	- 26.6	189,088	- 24.9	310,321	- 34.3	377,292	- 29.6	406,318	- 15.6	541,013	+ 4.5
1975	7,353,981	+ 17.2	341,816	+ 51.3	256,139	+ 35.5	565,789	+ 82.3	435,345	+ 15.4	522,364	+ 28.6	632,724	+ 17.0
1976			382,421	+11.9										
ONE NIGHT														
1972	1,257,936		67,920		61,796		78,202		91,000		103,862		128,291	
1973	1,136,992	- 9.6	60,893	- 10.3	50,068	- 19.0	69,200	- 11.5	82,287	- 9.6	93,043	- 10.4	100,901	- 21.3
1974	1,053,382	- 7.4	48,290	- 20.7	45,662	- 8.8	57,167	- 17.4	68,152	- 17.2	80,157	- 13.8	111,592	+ 10.6
1975	1,101,440	+ 4.6	54,835	+ 13.6	48,520	+ 6.3	72,612	+ 27.0	62,253	- 8.7	90,660	+ 13.1	119,024	+ 6.7
1976			53,132	-3.1										
TWO OR MORE NIGHTS														
1972	5,768,775		235,652		191,915		323,061		437,234		400,338		405,062	
1973	5,604,015	- 2.9	246,707	+ 4.7	201,625	+ 5.1	402,784	+ 24.7	453,278	+ 3.7	388,220	- 3.0	416,575	+ 2.6
1974	5,221,960	- 6.8	177,611	- 28.0	143,426	- 28.9	253,154	- 37.1	309,140	- 31.8	326,161	- 16.0	429,421	+ 3.1
1975	6,252,541	+ 19.7	286,981	+ 61.6	207,619	+ 44.8	493,177	+ 94.8	373,092	+ 20.7	431,704	+ 32.4	513,709	+ 19.6
			329,289	+14.7										

	JULY	% CHANGE	AUGUST	% CHANGE	SEPTEMBER	% CHANGE	OCTOBER	% CHANGE	NOVEMBER	% CHANGE	DECEMBER	% CHANGE
AUTOMOBILE												
1972	1,396,290		1,272,123		674,733		552,991		320,915		284,326	
1973	1,241,168	- 11.1	1,195,926	- 6.0	656,808	- 2.7	522,110	- 5.6	316,582	- 1.3	242,832	- 14.6
1974	1,183,187	- 4.7	1,222,937	+ 2.3	654,277	- 0.4	521,458	- 0.1	326,923	+ 3.3	316,627	+ 30.4
1975	1,287,967	+ 8.9	1,408,160	+ 15.1	639,690	- 2.2	562,077	+ 7.8	392,907	+ 20.2	309,003	- 2.4
ONE NIGHT												
1972	211,262		182,304		112,527		99,000		67,401		54,371	
1973	184,555	- 12.6	177,833	- 2.5	110,834	- 1.5	88,428	- 10.7	66,452	- 1.4	52,498	- 3.4
1974	162,595	- 11.9	168,668	- 5.2	108,407	- 2.2	81,099	- 8.3	67,061	+ 0.9	54,532	+ 3.9
1975	164,590	+ 1.2	177,694	+ 5.4	104,483	- 3.6	81,679	+ 0.7	72,276	+ 7.8	52,814	- 3.1
TWO OR MORE NIGHTS												
1972	1,185,028		1,089,819		562,206		453,991		253,514		229,955	
1973	1,056,613	- 10.8	1,018,093	- 6.6	545,974	- 2.9	433,682	- 4.5	250,130	- 1.3	190,334	- 17.2
1974	1,020,592	- 3.4	1,054,269	+ 3.6	545,870	+ 0.0	440,359	+ 1.5	259,862	+ 3.9	262,095	+ 37.7
1975	1,123,377	+ 10.1	1,230,466	+ 16.7	535,207	- 2.0	480,398	+ 9.1	320,631	+ 23.4	256,189	- 2.3

TABLE 7 (cont'd)

CANADIAN TRAVELERS RETURNING FROM THE US TO CANADA BY TYPE OF TRANSPORTATION
1972-1976

	TOTAL	% CHANGE	JANUARY	% CHANGE	FEBRUARY	% CHANGE	MARCH	% CHANGE	APRIL	% CHANGE	MAY	% CHANGE	JUNE	% CHANGE
BUS(ONE OR MORE NIGHTS)														
1972	514,396		56,034		31,409		46,479		45,599		43,489		47,313	
1973	508,731	- 1.1	35,657	- 36.4	34,751	+ 10.6	43,289	- 6.9	50,082	+ 9.8	42,093	- 3.2	46,708	- 1.3
1974	564,695	+ 11.0	38,015	+ 6.6	32,573	- 6.3	56,214	+ 29.9	63,843	+ 27.5	50,848	+ 20.8	46,835	+ 0.3
1975	539,018	- 4.5	37,608	- 1.1	36,630	+ 12.5	58,320	+ 3.7	48,710	- 23.7	47,641	- 6.3	36,358	- 22.4
1976			41,335	+10.0										
RAIL														
1972	10,371		16		20		20		130		376		578	
1973	19,395	+ 87.0	1,573	+9731.2	1,087	+5335.0	1,597	+7885.0	2,488	+1813.8	1,125	+ 199.2	981	+ 69.7
1974	36,093	+ 86.1	2,166	+ 37.7	2,225	+ 104.7	2,948	+ 84.6	3,713	+ 49.2	2,994	+ 166.1	2,495	+ 154.4
1975	34,796	- 3.6	2,504	+ 15.6	1,743	- 21.7	2,787	- 5.5	2,868	- 22.8	3,199	+ 6.8	2,732	+ 9.5
1976			2,726	+8.9										
AIR														
1972	1,115,913		92,684		92,578		133,464		128,877		90,018		77,745	
1973	1,349,220	+ 20.9	138,861	+ 49.8	115,517	+ 24.8	161,816	+ 21.2	135,145	+ 4.9	102,938	+ 14.4	87,925	+ 13.1
1974	1,579,928	+ 17.1	164,490	+ 18.5	138,579	+ 20.0	219,465	+ 35.6	157,238	+ 16.3	119,914	+ 16.5	102,038	+ 16.1
1975	1,756,326	+ 11.2	199,562	+ 21.3	161,218	+ 16.3	236,182	+ 7.6	192,296	+ 22.3	133,480	+ 11.3	106,058	+ 3.9
1976			209,790	+5.1										

	JULY	% CHANGE	AUGUST	% CHANGE	SEPTEMBER	% CHANGE	OCTOBER	% CHANGE	NOVEMBER	% CHANGE	DECEMBER	% CHANGE
BUS(ONE OR MORE NIGHTS)												
1972	61,651		54,598		30,933		42,583		27,657		26,651	
1973	54,976	- 10.8	58,614	+ 7.4	39,426	+ 27.5	44,503	+ 4.5	31,236	+ 12.9	27,396	+ 2.8
1974	60,343	+ 9.8	63,265	+ 7.9	40,977	+ 3.9	52,570	+ 18.1	29,556	- 5.4	29,656	+ 8.2
1975	55,593	- 7.9	62,878	- 0.6	44,432	+ 8.4	49,632	- 5.6	34,843	+ 17.9	26,373	- 11.1
RAIL												
1972	1,165		2,929		1,035		1,250		1,320		1,532	
1973	2,423	+108.0	1,265	- 56.8	1,056	+ 2.0	1,725	+ 38.0	1,708	+ 29.4	2,367	+ 54.5
1974	4,046	+ 67.0	4,993	+294.7	2,680	+153.8	2,635	+ 52.8	2,439	+ 42.8	2,758	+ 16.5
1975	4,179	+ 3.3	4,876	- 2.3	2,203	- 17.8	3,334	+ 26.5	2,320	- 4.9	2,053	- 25.6
AIR												
1972	73,433		83,708		75,452		88,904		87,832		91,218	
1973	93,041	+ 26.7	101,743	+ 21.5	92,295	+ 22.3	104,283	+ 17.3	106,346	+ 21.1	109,310	+ 19.8
1974	102,166	+ 9.8	116,663	+ 14.7	103,560	+ 12.2	121,267	+ 16.3	118,042	+ 11.0	116,506	+ 6.6
1975	108,574	+ 6.3	129,286	+ 10.8	106,943	+ 3.3	129,136	+ 6.5	130,942	+ 10.9	122,649	+ 5.3

TABLE 7 (cont'd)

CANADIAN TRAVELERS RETURNING FROM THE US TO CANADA BY TYPE OF TRANSPORTATION
1972-1976

	TOTAL	% CHANGE	JANUARY	% CHANGE	FEBRUARY	% CHANGE	MARCH	% CHANGE	APRIL	% CHANGE	MAY	% CHANGE	JUNE	% CHANGE
SEA														
1972	150,927		150		20		19		112		3,541		15,405	
1973	190,371	+ 26.1	30	- 80.0	86	+ 330.0	106	+ 457.9	684	+ 510.7	3,508	- 0.9	25,371	+ 64.7
1974	208,767	+ 9.7	109	+ 263.3	88	+ 2.3	159	+ 50.0	443	- 35.2	2,132	- 39.2	39,398	+ 55.3
1975	231,503	+ 10.9	56	- 48.6	50	- 43.2	268	+ 68.6	436	- 1.6	9,926	+ 365.6	43,780	+ 11.1
1976			152	+171.4										
TOTAL														
1972	8,818,318		432,456		377,738		581,245		702,952		641,624		675,394	
1973	8,808,724	- 0.1	483,721	+ 6.9	403,134	+ 6.7	678,792	+ 16.8	723,964	+ 3.0	630,927	- 1.7	678,461	+ 0.5
1974	8,664,825	- 1.6	430,681	- 11.0	362,553	- 10.1	589,107	- 13.2	602,529	- 16.8	582,206	- 7.7	731,780	+ 7.9
1975	9,915,626	+ 14.4	581,546	+ 35.0	455,780	+ 25.7	863,346	+ 46.6	679,655	+ 12.8	716,610	+ 23.1	821,652	+ 12.3
1976			636,444	+9.4										

	JULY	% CHANGE	AUGUST	% CHANGE	SEPTEMBER	% CHANGE	OCTOBER	% CHANGE	NOVEMBER	% CHANGE	DECEMBER	% CHANGE
SEA												
1972	57,842		56,068		15,758		1,460		380		172	
1973	70,785	+ 22.4	69,911	+ 24.7	18,418	+ 16.9	1,098	- 24.8	169	- 55.5	205	+ 19.2
1974	70,104	- 1.0	76,390	+ 9.3	17,612	- 4.4	1,969	+ 79.3	213	+ 26.0	150	- 26.8
1975	81,841	+ 16.7	77,465	+ 1.4	15,151	- 14.0	2,062	+ 4.7	258	+ 21.1	210	+ 40.0
TOTAL												
1972	1,590,381		1,469,426		797,911		687,188		438,104		403,899	
1973	1,462,393	- 8.0	1,427,459	- 2.9	808,003	+ 1.3	673,719	- 2.0	456,041	+ 4.1	382,110	- 5.4
1974	1,419,846	- 2.9	1,484,248	+ 4.0	819,106	+ 1.4	699,899	+ 3.9	477,173	+ 4.6	465,697	+ 21.9
1975	1,539,154	+ 8.3	1,682,665	+ 13.4	809,419	- 1.3	746,241	+ 6.6	561,270	+ 17.6	460,288	- 1.2

SOURCE: United States Travel Service based on data from Statistics Canada.

TABLE 8

CANADIAN TRAVELERS RETURNING FROM THE U.S. TO CANADA BY TYPE OF TRANSPORTATION
1974-1976

	1974		1975		January 1976	
	Number of Arrivals	Share of Total Arrivals	Number of Arrivals	Share of Total Arrivals	Number of Arrivals	Share of Total Arrivals
	6,275,342	72.4%	7,353,981	74.2%	382,421	60.1%
t	1,053,382	12.2	1,101,440	11.1	53,132	8.3
ce Nights	5,221,960	60.2	6,252,541	63.1	329,289	51.7
more nights)	564,489	6.5	539,018	5.4	41,355	6.5
	36,093	0.4	34,798	0.4	2,726	0.4
	1,579,928	18.2	1,756,326	17.7	209,790	33.0
	208,767	2.4	231,503	2.3	152	*
L	8,664,619	100.0	9,915,626	100.0	636,444	

s than 1/2 of 1%

TABLE 9

UNITED STATES TRAVELERS ENTERING CANADA BY TYPE OF TRANSPORTATION
1972-1976

	TOTAL	% CHANGE	JANUARY	% CHANGE	FEBRUARY	% CHANGE	MARCH	% CHANGE	APRIL	% CHANGE	MAY	% CHANGE	JUNE	% CHANGE
AUTOMOBILE														
1972	11,151,463		208,780		257,210		356,971		397,275		790,919		1,396,405	
1973	11,165,471	+ 0.1	221,934	+ 6.3	263,064	+ 2.3	360,024	+ 0.9	488,906	+ 23.1	821,078	+ 3.8	1,445,047	+ 3.5
1974	10,170,993	- 8.9	204,682	- 7.8	243,325	- 7.5	303,555	- 15.7	440,556	- 9.9	716,726	- 12.7	1,312,108	- 9.2
1975	10,015,217	- 1.5	222,200	+ 8.6	244,090	+ 0.3	347,678	+ 14.5	336,410	- 23.6	806,708	+ 12.6	1,359,909	+ 3.6
1976			217,265	-2.2										
ONE NIGHT														
1972	2,328,853		71,064		76,659		100,647		113,729		166,637		269,433	
1973	2,086,653	- 10.4	64,246	- 9.6	67,797	- 11.6	92,682	- 7.9	111,737	- 1.8	141,277	- 15.2	247,939	- 7.6
1974	1,907,676	- 8.6	52,877	- 17.7	54,646	- 19.4	72,881	- 21.4	95,864	- 14.2	137,516	- 2.7	224,514	- 9.4
1975	1,817,988	- 4.7	53,781	+ 1.7	57,039	+ 4.4	73,366	+ 0.7	76,227	- 20.5	142,061	+ 3.3	225,817	+ 0.6
1976			55,533	+3.3										
TWO OR MORE NIGHTS														
1972	8,822,610		137,716		180,551		256,324		283,546		624,282		1,127,972	
1973	9,078,818	+ 2.9	157,688	+ 14.5	195,267	+ 8.1	267,342	+ 4.3	377,169	+ 33.0	679,801	+ 8.9	1,197,108	+ 6.1
1974	8,263,317	- 9.0	151,805	- 3.7	188,679	- 3.4	230,674	- 13.7	344,692	- 8.6	579,210	- 14.8	1,087,594	- 9.1
1975	8,197,229	- 0.8	168,419	+ 10.9	187,051	- 0.9	274,312	+ 18.9	260,183	- 24.5	664,547	+ 14.7	1,134,092	+ 4.3
1976			161,732											

	JULY	% CHANGE	AUGUST	% CHANGE	SEPTEMBER	% CHANGE	OCTOBER	% CHANGE	NOVEMBER	% CHANGE	DECEMBER	% CHANGE
AUTOMOBILE												
1972	2,623,886		2,489,352		1,213,701		672,839		384,569		359,556	
1973	2,442,680	- 6.9	2,507,244	+ 0.7	1,134,521	- 6.5	727,938	+ 8.2	403,371	+ 4.9	349,666	- 2.7
1974	2,190,053	- 10.3	2,493,033	- 0.6	935,445	- 17.5	627,591	- 13.8	386,104	- 4.3	317,815	- 9.1
1975	2,198,727	+ 0.4	2,374,661	- 4.7	831,041	- 11.2	609,034	- 3.0	371,644	- 3.7	313,115	- 1.5
ONE NIGHT												
1972	475,581		471,184		252,061		157,917		96,407		78,134	
1973	400,500	- 15.9	417,936	- 11.3	222,698	- 11.6	150,998	- 4.4	93,864	- 2.6	74,979	- 4.0
1974	374,905	- 6.4	413,477	- 1.1	192,691	- 13.5	133,360	- 11.7	91,028	- 3.0	63,917	- 14.8
1975	353,452	- 5.7	395,397	- 4.4	160,372	- 16.8	126,509	- 5.1	87,644	- 3.7	66,323	+ 3.8
TWO OR MORE NIGHTS												
1972	2,147,905		2,018,168		951,640		514,922		288,162		281,422	
1973	2,042,180	- 4.9	2,089,308	+ 3.5	911,823	- 5.2	576,940	+ 12.0	309,507	+ 7.4	274,685	- 2.4
1974	1,815,148	- 11.1	2,079,556	- 0.5	742,754	- 18.5	494,231	- 14.3	295,076	- 4.7	253,898	- 7.6
1975	1,945,275	+ 1.7	1,979,264	- 4.8	670,669	- 9.7	482,525	- 2.4	284,000	- 3.8	246,792	- 2.8

TABLE 9 (cont'd)

UNITED STATES TRAVELERS ENTERING CANADA BY TYPE OF TRANSPORTATION
1972-1976

	TOTAL	% CHANGE	JANUARY	% CHANGE	FEBRUARY	% CHANGE	MARCH	% CHANGE	APRIL	% CHANGE	MAY	% CHANGE	JUNE	% CHANGE
BUS(ONE OR MORE NIGHTS)														
1972	683,534		31,346		33,175		35,448		43,006		72,454		74,264	
1973	781,271	+ 14.3	22,921	- 26.9	27,879	- 16.0	37,130	+ 4.7	49,141	+ 14.3	89,787	+ 23.9	93,683	+ 26.1
1974	807,842	+ 3.4	25,647	+ 11.9	35,311	+ 26.7	38,184	+ 2.8	60,123	+ 22.3	92,522	+ 3.0	91,967	- 1.8
1975	764,850	- 5.3	27,109	+ 5.7	33,546	- 5.0	36,023	- 5.7	37,800	- 37.1	82,415	- 10.9	84,194	- 8.5
1976			22,640	15.5										
RAIL														
1972	36,809		393		388		365		372		1,017		4,310	
1973	59,850	+ 62.6	2,127	+ 441.2	2,058	+ 430.4	1,929	+ 428.5	1,969	+ 429.3	3,343	+ 228.7	8,418	+ 95.3
1974	90,721	+ 51.6	3,161	+ 48.6	3,511	+ 70.6	3,453	+ 79.0	3,716	+ 88.7	5,663	+ 69.4	12,417	+ 47.5
1975	78,119	- 13.9	2,961	- 6.3	3,369	- 4.0	2,998	- 13.2	3,027	- 18.5	5,540	- 2.2	10,263	- 17.3
1976			3,983	+34.5										
AIR														
1972	1,187,999		43,711		61,811		79,182		84,630		98,872		135,993	
1973	1,429,621	+ 20.3	74,048	+ 69.4	72,640	+ 17.5	84,051	+ 6.1	99,491	+ 17.6	117,706	+ 19.0	155,363	+ 15.0
1974	1,607,118	+ 12.4	84,203	+ 13.7	86,867	+ 19.6	108,773	+ 29.4	105,586	+ 6.1	135,609	+ 15.2	184,089	+ 17.7
1975	1,529,782	- 4.8	87,521	+ 3.9	79,184	- 8.8	92,871	- 14.6	105,292	- 0.3	130,937	- 3.4	178,572	- 3.0
1976			78,869	-9.9										

	JULY	% CHANGE	AUGUST	% CHANGE	SEPTEMBER	% CHANGE	OCTOBER	% CHANGE	NOVEMBER	% CHANGE	DECEMBER	% CHANGE
BUS(ONE OR MORE NIGHTS)												
1972	107,676		103,294		73,308		48,415		30,172		30,976	
1973	139,177	+ 29.3	138,765	+ 34.4	81,534	+ 11.2	51,990	+ 7.4	25,466	- 15.6	23,778	- 23.2
1974	139,411	+ 0.2	141,480	+ 1.9	69,057	- 15.3	61,733	+ 18.7	26,762	+ 5.1	25,645	+ 7.9
1975	128,813	- 7.6	153,942	+ 8.8	69,964	+ 1.3	58,981	- 4.5	26,307	- 1.7	25,765	+ 0.5
RAIL												
1972	8,627		9,719		3,002		2,967		2,670		2,979	
1973	12,733	+ 47.6	11,022	+ 13.4	7,651	+154.9	2,951	- 0.5	2,540	- 4.9	3,109	+ 4.4
1974	13,955	+ 9.6	20,614	+ 87.0	11,466	+ 49.9	5,166	+ 75.1	4,079	+ 60.6	3,520	+ 13.2
1975	16,997	+ 21.8	19,607	- 4.9	990	- 91.4	4,630	- 10.4	3,281	- 19.6	4,456	+ 26.6
AIR												
1972	144,211		157,119		114,288		99,756		82,499		85,927	
1973	195,887	+ 35.8	191,181	+ 21.7	137,269	+ 20.1	118,633	+ 18.9	89,544	+ 8.5	92,808	+ 8.0
1974	196,833	+ 0.5	220,725	+ 15.5	158,053	+ 15.1	134,608	+ 13.5	94,132	+ 5.1	97,640	+ 5.2
1975	192,227	- 2.3	204,164	- 7.5	144,218	- 8.8	123,943	- 7.9	90,853	- 3.5	100,000	+ 2.4

TABLE 9 (cont'd)

UNITED STATES TRAVELERS ENTERING CANADA BY TYPE OF TRANSPORTATION
1972-1976

	TOTAL	% CHANGE	JANUARY	% CHANGE	FEBRUARY	% CHANGE	MARCH	% CHANGE	APRIL	% CHANGE	MAY	% CHANGE	JUNE	% CHANGE
SEA														
1972	804,417		78		268		296		282		21,969		167,452	
1973	856,125	+ 6.4	125	+ 60.3	243	- 9.3	772	+ 160.8	1,351	+ 379.1	32,704	+ 48.9	153,232	- 8.5
1974	893,863	+ 4.4	113	- 9.6	137	- 43.6	643	- 16.7	1,284	- 5.0	32,876	+ 0.5	178,163	+ 16.3
1975	801,357	- 10.3	69	- 38.9	115	- 16.1	354	- 44.9	1,129	- 12.1	40,825	+ 24.2	191,976	+ 7.7
1976			146	+115.9										
TOTAL														
1972	13,864,222		284,308		362,852		472,262		525,565		985,231		1,778,424	
1973	14,292,338	+ 3.1	321,155	+ 13.0	365,884	+ 3.7	483,906	+ 2.5	640,858	+ 21.9	1,064,618	+ 8.1	1,855,743	+ 4.4
1974	13,570,537	- 5.0	317,606	- 1.0	369,151	+ 0.9	454,608	- 6.1	611,265	- 4.6	983,396	- 7.6	1,778,744	- 4.2
1975	13,189,334	- 2.8	339,860	+ 6.9	360,304	- 2.4	479,924	+ 5.6	483,658	- 20.9	1,066,425	+ 8.4	1,824,814	+ 2.6
1976			322,903	-5.0										

	JULY	% CHANGE	AUGUST	% CHANGE	SEPTEMBER	% CHANGE	OCTOBER	% CHANGE	NOVEMBER	% CHANGE	DECEMBER	% CHANGE
SEA												
1972	279,360		270,124		55,826		7,522		674		566	
1973	295,430	+ 5.8	298,517	+ 10.5	67,496	+ 20.9	5,081	- 32.5	900	+ 33.5	274	- 51.6
1974	313,294	+ 6.0	315,436	+ 5.7	45,370	- 32.8	5,492	+ 8.1	856	- 4.9	197	- 28.1
1975	277,502	- 11.4	248,670	- 21.2	34,617	- 23.7	4,952	- 9.8	1,048	+ 22.4	200	+ 1.5
TOTAL												
1972	3,163,760		3,029,608		1,460,125		831,499		500,584		480,004	
1973	3,085,907	- 2.5	3,146,749	+ 3.9	1,428,471	- 2.2	906,593	+ 9.0	521,821	+ 4.2	469,633	- 2.2
1974	2,853,546	- 7.5	3,191,290	+ 1.4	1,219,391	- 14.6	834,590	- 7.9	511,933	- 1.9	444,817	- 5.3
1975	2,814,266	- 1.4	3,001,044	- 6.0	1,080,830	- 11.4	801,540	- 4.0	493,133	- 3.7	443,536	- 0.3

SOURCE: United States Travel Service based on data from Statistics Canada.

TABLE 10

U. S. TRAVELERS TO CANADA BY TYPE OF TRANSPORTATION

	1974		1975		January 1976	
	Number of Arrivals	Share of Total Arrivals	Number of Arrivals	Share of Total Arrivals	Number of Arrivals	Share of Total Arrivals
Automobile	10,170,993	74.9%	10,015,217	75.9%	217,265	67.3%
One Night	1,907,676	14.0	1,817,988	13.8	55,533	17.2
2 or More Nights	8,263,317	60.9	8,197,229	62.1	161,732	50.1
Bus (1 or more nights)	807,842	6.0	764,859	5.8	22,640	7.0
Rail	90,721	0.7	78,119	0.6	3,983	1.2
Air	1,607,118	11.8	1,529,782	11.6	78,869	24.4
Sea	893,863	6.6	801,357	6.1	146	*
TOTAL	13,570,537	100.0	13,189,334	100.0	322,903	

*Less than ½ of 1%

ANALYSIS OF THE INTERNATIONAL TRAVEL MARKET OF SELECTED COUNTRIES

"Japanese International Travel Market 1975"

JAPANESE INTERNATIONAL TRAVEL MARKET
1975

Introduction

Compiled in early 1976, this analysis presents the findings of a USTS survey of existing secondary data sources concerning the Japanese international travel market in 1975. Sources for this market analysis include the U.S. Department of State; U.S. Department of Commerce; Japanese Ministry of Transport, Mainichi Shimbum surveys; Japan National Tourist Organization; and various Japanese travel trade sources.

Scope and Limitations

Since this analysis is based on a survey of secondary data, no primarily USTS research was involved. The findings presented should, therefore, be viewed with this limitation in mind, with full recognition of the research methodology applicable to each particular data source. For example, certain descriptions concerning characteristics of Japanese travelers are based upon data contained in the seventh, eighth and ninth Mainichi Shimbum surveys, "On Japanese Overseas Air Travelers"--studies which analyzed departures of Japanese nationals from the Tokyo International Airport during one-week periods during April of 1973 to 1975. Obviously, the scope and limitations must be recognized in viewing the particular findings which were drawn from these surveys.

I. ECONOMIC/DEMOGRAPHIC DATA

A. Economic Environment

The longest and most severe economic recession in Japan's post-war history may have bottomed out during the first half of 1975. The timing and rate of recovery, however, are both still uncertain.

In 1974, real GNP declined by an estimated 2% from 1973, when the economy grew 10.2%. According to the Ministry of International Trade and Industry, growth in 1975 is expected to be around 2%. Although the recession has reached its lowest point, unemployment remains at high levels and is expected to rise above the 2% mark for the current year (compared to 1.4% in 1974). Consumer demand is still slack, and business investment is sluggish.

According to U.S. Department of State sources, the Japanese recession is due in part to the government's concern during the past two years with the problem of inflation. In 1974, the consumer price index rose about 25%--the highest among the developed countries. The inflationary spiral was stimulated in large part by the quadrupling of oil prices and by large wage hikes averaging over 30% in 1974. Beginning in November 1974, the Miki administration's economic policy placed primary emphasis on achieving price stability. In recent months, the rate of inflation has dropped off to less than 15%. Organized labor accepted wage settlements averaging increases of about 14% in the Spring of 1975 (compared with 33% a year ago). Nevertheless, Japanese policy-makers still remain concerned about a possible resurgence of inflation and have delayed taking significant expansionary measures despite pressure from industry.

The bright side of the economic picture is in trade. Although its oil imports more than tripled in 1975, Japan managed to record a small surplus on its trade balance through aggressive export marketing. In 1974, exports rose almost 50% in value. Japan's foreign exchange reserves, as of the first quarter of 1975, were estimated at about $14 billion.

On balance, Japanese officials look for a gradual recovery of their economy, beginning in the latter half of 1975.

(See Appendix A for detailed data concerning the Japanese economic environment.)

B. Deomographic Information

The 1975 population of Japan is estimated at 111 million. The rate of growth, however, is relatively low, at 1.2% per annum. This low growth rate is a result of a declining birth rate which has altered the age structure of the population, resulting in a greater proportion of the population in the productive, middle-age group. (The median age is 30.4 years.)

With respect to major metropolitan areas, the population of Tokyo is estimated at approximately 11.5 million; Osaka, 2.8 million; Yokohama, 2.6 million; Nagayo, 2.0 million; and Kyoto, 1.4 million. Overall, 83% of Japan's citizens live in cities, and 55% of the total population live in the following industrial centers: the Kanto area (Tokyo-Yokahama), the Kansai area (Osaka, Kobe, Kyoto), and the Kinki area (Nagoya). (See map.)

II. OVERSEAS TRAVEL ENVIRONMENT

From 1970 to 1973, foreign travel by Japanese citizens grew at the average annual growth rate of 47%. Reflecting the economic difficulties in Japan, overseas travel by Japanese nationals rose only 4.1% in 1974 and, according to preliminary Japanese National Tourist Office estimates, declined in 1975. During 1975, total departures from Japan numbered approximately 2,335,000, 2.1% below the 1974 figure of 2,383,938.

A. Factors Affecting Japanese Overseas Travel in 1974/1975

The economic recession and high inflation, both contributed heavily to the slowdown and decline in foreign travel by Japanese citizens in 1974 and 1975. Other factors also influenced the trend of foreign travel from Japan, such as: (1) devaluation of the Yen; (2) Japanese government action to limit currency outflows; (3) suspension of flights to Taipei; (4) political difficulties between Japan and Taiwan and Korea; and (5) new GIT Pacific fares.

The increased cost of oil (Japan must import almost 100% of its oil) has put pressure on the Yen. The Yen had been trading at ¥280 to the U.S. dollar (1973), but during late 1974 and 1975, the Yen was devalued with respect to the dollar and, as of December 23, 1975, was supported by the Bank of Japan at ¥306 to the U.S. dollar.

The Japanese government, in an effort to assist in the preservation of foreign exchange, imposed a system which limits the outflow of

currency. For amounts up to U.S. $1,500, overseas travelers must have the approval of a commercial bank. For amounts in excess of U.S. $1,500, the approval must be obtained from the Bank of Japan. These limits apply to each person/trip abroad. (The previous limit was U.S. $3,000.)

The suspension of flights from Japan to Taipei by two airlines and the political difficulties between Japan and Korea and Taiwan also affected outbound tourist traffic from Japan in 1974 and 1975. Historically, approximately 19% of Japanese international travelers visit Taiwan and 20% travel to Korea. In the peak year of 1973, Taiwan received 438,000 Japanese, while Korea received 475,000 Japanese visitors--representing in the aggregate nearly 40% of all Japanese international travel abroad.

The final influencing factor which could have an impact on the Japanese overseas travel market concerns the new GIT Pacific fares which became effective October 1, 1975. The new trans-Pacific GIT rates have spurred considerable controversial reaction among members of the Japanese travel trade. Since the new GIT fares replace the former CBIT fares and are not subject to rebating, some wholesalers and retailers feel they cannot absorb the cost increase and must pass most of it on to the consumer.

In addition, the off-season European fares have become competitive with U.S.A. West Coast fares for the same period. Some major Japanese wholesalers and retailers feel that even if U.S.A. traffic "could" be diverted to Europe, the increased fare structure will result in fewer Japanese traveling abroad to long-haul destinations.

B. Geographical Structure of the Japanese Overseas Travel Market

In the broadest sense, 55% of Japan's overseas travel is generated in the "Tokkaido megalopolis," the densely populated and highly industrialized region of Honshu Island between Tokyo and Osaka. The Western section of Honshu, comprising Okayama and Hiroshima prefectures, and the islands of Shikoku and Kyushu account for 35% of the Japanese overseas travel market, while northern Honshu and Hokkaido account for the remaining 10%.

Seventy percent of the Japanese traffic out of and into Japan is through Haneda (Tokyo International) Airport, according to a Japan Air News publication on February 10, 1975.

C. Destinations of Japanese Overseas Travelers

Foreign travel by Japanese citizens is generally concentrated toward two major areas: Asia (53%) and North America (33%). Europe receives approximately 11% of the outbound Japanese tourists. Asia is preferred during the winter months, while North America is more popular during the summer period.

TABLE 1

Destination of Japanese Overseas Travelers

Destination	Share of Total Departures 1972	1973	1974
Asia	53.1%	57.4%	53.0 (est)
North America	30.6	28.6	32.7 (est)
U.S.A.	30.0	27.9	32.0
Canada	N.A.	0.4	0.5
Mexico	N.A.	0.2	0.2
Europe	12.8	11.2	11.4
Oceania	1.0	0.7	0.9
South America	0.7	0.6	0.6
Africa	0.5	0.4	0.4
Other	1.3	1.1	1.0

Source: Ministry of Transport, Japan ("Statistics on Foreign Visitors to Japan"); U.S. Travel Service.

The above data concerning Japanese overseas travel in 1972 also basically agrees with the findings of the 1973 USTS survey, "A Study of Japanese Travel Habits and Patterns," which showed Asia to be the final destination of 59% of Japanese trips abroad; the U.S., 28% and Europe 10%.

Primary Asian destinations of Japanese overseas travelers are Hong Kong, Korea, Macau, Taiwan, Philippines, Thailand, and Singapore. On the other hand, the United States (including Guam and Hawaii) dominates as the primary North American destination.

III. Japanese Travel to the United States

Among individual nations of the world, the U.S. ranks as the number one international travel destination for Japanese travelers, receiving 32% of the total Japanese departures in 1974. During this year, 763,215 Japanese visitors traveled to the U.S., 19.6% more than during the previous year, 1973.

Of this number, approximately 50% had Hawaii as their first U.S. destination, while 24% entered the U.S. at Guam, and 26% entered on the Mainland (according to 1974 port-of-entry data). It is important to note that while one-half of the Japanese tourists had Hawaii as their U.S. point-of-entry during 1974, a portion of these visitors likely traveled on from Hawaii to U.S. mainland destinations.

During 1975, 746,124 Japanese visitors traveled to the U.S., 2.2 less than in 1974--representing the first such annual decline in over a decade. Spending by these Japanese tourists in the U.S. during 1975 is estimated at $400 million, 0.5% less

than during 1974 and yeilding a per capita expenditure rate of $536 for each visitor from Japan.

Closely paralleling the U.S. share of total Japanese overseas travelers, the amount spent by Japanese visitors in the U.S. comprises approximately one-third of Japan's total international travel expenditures--30% in 1974 and 29% in 1975.

TABLE 2

Japanese International Travel
1972 - 1975

Year	Total Japanese Departures	Total Expenditures (millions)	Arrivals in the U.S.	Share of Total	Expenditures in the U.S. (millions)	Share of Total
1972	1,392,045	$ 774	417,048	30.0%	$ 205	26.5%
1973	2,288,966	1,252	638,330	27.9	334	26.7
1974	2,383,938	1,358	763,215	32.0	402	29.6
1975	2,335,000(e)	1,400(e)	746,124	32.0	400(e)	28.6

A) Traveler Characteristics

Analyzing the traveler characteristics of Japanese visitors to the U.S., this section presents the demographic attributes of these travelers by residence, sex, age, marital status, education, occupation and family income.

Residence: According to a USTS 1973 Travel Patterns survey of I-94 forms (latest available data), Tokyo is the principal source of Japanese visitors to the U.S.--accounting for 36% of the total arrivals in 1973. In comparison, only 11% of Japan's population resides in the Tokyo area. Osaka and Yokohama were the next largest residences of visiting Japanese tourist in 1973, comprising 7% and 5%, respectively.

TABLE 3

Characteristics of Japanese Travelers to the U.S.

by Residence -- 1973

City of Residence	Population	Travelers to the U.S.
Tokyo	11%	36%
Osaka	3	7
Yokohama	2	5
Chiba	N.A.	3
Kyota	1	3
Nagoyo	2	2
Other cities/areas	81	44
(Base)	(109 million)	(638,330)

The following descriptions concerning characteristics of Japanese travelers are based upon data contained in the 7th, 8th, and 9th Mainichi Shimbum surveys "On Japanese Overseas Air Travelers"--studies which analyzed departures of Japanese nationals from the Tokyo International Airport during one-week periods during April of 1973-1975.

Sex: Two-thirds (64% of the Japanese visitors to the U.S. in 1975 were male compared to three-fourths (74%) of the total international travelers from Japan. There is a marked trend, however, both within the total Japanese international travel market and among travelers to the U.S., toward a higher proportion of female travelers. The share of female visitors to the U.S. rose from 22% in 1973 to 36% in 1975.

TABLE 4

Characteristics of Japanese International Travelers

by Sex

Sex	1973 International Travelers	1973 U.S. Visitors	1974 International Travelers	1974 U.S. Visitors	1975 International Travelers	1975 U.S. Visitors
Male	80%	78%	77%	72%	74%	64%
Female	20	22	23	28	26	36
(Base)	(682)	(395)	(664)	(284)	(877)	(420)

This proportion of male/female travelers varies, however, by U.S. destination. As indicated in Table 5, it appears fairly evenly split in males/females traveling to Guam, with a predominance of male travelers to Hawaii and the the Mainland. This finding is particularly emphasized when viewing Japanese travel to Eastern U.S. destinations, where 85% are males, undoubtedly reflecting the high proportion of business travel to this area.

TABLE 5

Male/Female Distribution by U.S. Destination, 1975

Sex	Guam	Hawaii	U.S. Mainland		
			West	East	Total
Male	48%	62%	68%	85%	74%
Female	52	38	38	15	26
(Base)	(97)	(133)	(128)	(62)	(190)

Age: Almost half (49%) of the Japanese visitors to the U.S. in 1975 were under 30 years of age, and an additional 24% were in their thirties. Only 12% were 50 or over. The trend toward a "younger" Japanese travel market is seen in Table 6, where the under 30 age group increased in proportion from 28% in 1973 to 49% in 1975.

TABLE 6

Characteristics of Japanese International Travelers

By Age

Age	1973 International Travelers	1973 U.S. Visitors	1974 International Travelers	1974 U.S. Visitors	1975 International Travelers	1975 U.S. Visitors
Under 30 yrs.	23%	28%	30%	43%	35%	49%
30-39 years	29	32	28	23	25	24
40-49 years	30	22	25	22	23	15
50 or over	18	18	17	12	17	12
(Base)	(682)	(395)	(664)	(284)	(877)	(420)

Age dispersions also varied among Japanese travel groups to different U.S. destinations. Almost three-fourths of the travelers to Guam (a "honeymoon" destination and resort for the young single are under 30 years of age. Over half (56%) of the Japanese visitors to Hawaii are also in this age group. Travelers to the Eastern sections of the U.S. mainland, on the other hand, are generally older--71% are from 30 to 49 years of age.

TABLE 7

Age Distributions Among Japanese Travelers

to U.S. Regions -- 1975

Age	Guam	Hawaii	U.S. Mainland West	U.S. Mainland East	U.S. Mainland Total
Under 30 years	72%	56%	39%	10%	31%
30-39 years	13	20	29	40	33
40-49 years	8	11	17	31	22
50 or over	6	12	15	13	;14
(Base)	(97)	(133)	(128)	(62)	(190)

Marital Status: Although two-thirds (65%) of the Japenese travelers to the U.S. in 1975 were married, there appears to be a trend for an increasingly larger proportion of the international travel market to be composed of single persons.

TABLE 8

Characteristics of Japanese International Travelers

By Marital Status

Marital Status	1973 International Travelers	1973 U.S. Visitors	1974 International Travelers	1974 U.S. Visitors	1975 International Travelers	1975 U.S. Visitors
Married	81%	79%	80%	81%	72%	65%
Single	19	21	20	19	27	35
(Base)	(682)	(395)	(664)	(284)	(877)	(420)

Marital status distributions among Japanese travelers to the Western sections of the U.S. Mainland and to Hawaii were basically the same as for the total traveling group to the entire U.S. However, among visitors to Guam, 41% were single (primarily females) and 59% were married (primarily males). Conversely, Japanese travelers to the Eastern U.S. were predominantly made up of married persons. (79% -- primarily males).

TABLE 9

Marital Status of Japanese Travelers

to U.S. Regions -- 1975

Marital Status	Guam	Hawaii	U.S. Mainland West	U.S. Mainland East	U.S. Mainland Total
Married	41%	64%	62%	79%	68%
Single	59	36	38	21	32
(Base)	(97)	(133)	(128)	(62)	(190)

Education: Sixty-three percent of the Japanese travelers to the U.S. in 1975 had attended or completed a university-level education. Thirty-one percent had attended or completed senior high school, and five percent had only completed primary/junior high school. (Educational breakdown of visitors

to the U.S. for 1973 or 1974 is unavailable.) In comparison, of the total Japanese overseas travelers in 1975, 61% had attended or completed a university-level education, and 33% had a high school education.

When analyzing the education levels of Japanese travelers to various U.S. destinations in 1975, different patterns emerge. Travelers to Guam, for example, tend to be less educated (38% university; 57% senior high school) than those to the U.S. Mainland or Hawaii, reflecting the large proportion of the under 30 who travel there. Japanese visitors to the Eastern U.S. tend to possess the highest educational backgrounds; 84% of this group had attended or completed a university-level education, again reflecting the older age group and business travel.

T A B L E 10

Education Level of Japanese Travelers

to U.S. Regions -- 1975

Education Level	Guam	Hawaii	U.S. Mainland West	U.S. Mainland East	U.S. Mainland Total
Primary/Junior High	5%	7%	5%	3%	4%
Senior High	57	31	22	13	19
University	38	62	73	84	77
(Base)	(97)	(133)	(128)	(62)	(190)

Occupation: Almost four-in-ten (39% of the Japanese travelers to the U.S. in 1975 were employed as blue-collar workers, a proportion significantly greater than during previous years. Conversely, the share of directors, managers, and professionals was only 31% in 1975, down by 11 percentage points from 1974 and 16 points from 1973. In addition, these professional managerial travelers seem to be less prevalent among visitors to the U.S. (26% of the total) than among total Japanese international travelers (41%).

T A B L E 11

Characteristics of Japanese International Travelers

by Occupation

	1973		1974		1975	
	International Travelers	U.S. Visitors	International Travelers	U.S. Visitors	International Travelers	U.S. Visitors
Director/Manager	48%	39%	45%	37%	41%	26%
Professionals	7	8	6	5	5	5
Blue-Collar Workers	23	28	25	28	30	39
Self-Employed	8	5	5	4	4	4
Housewives	7	7	8	11	7	12
Other	7	12	11	16	13	14
(Base)	(682)	(395)	(664)	(284)	(877)	(420)

Among Japanese travelers to U.S. destinations, in 1975 those traveling to the Eastern sections of the U.S. Mainland had the greatest proportion of up-scale occupations (54%). On the other hand, 53% of the Japanese travelers to Guam were blue-collar workers, and 14% were housewives. Each of these findings appear to be consistent with the destinational distributions concerning sex, age, and educational levels of these visitors.

T A B L E 12

Occupational Distribution of Japanese Travelers to U.S. Regions--1975

Occupation	Guam	Hawaii	U.S. Mainland West	U.S. Mainland East	U.S. Mainland Total
Directors/Managers	10%	23%	30%	(48%)	36%
Professionals	3	5	6	6	6
Blue-collar Workers	(53)	(37)	(38)	26	34
Self-Employed	1	5	4	3	4
Housewives	14	14	9	10	9
Other	19	16	13	7	11
(Base)	(97)	(133)	(128)	(62)	(190)

Family Income: During 1975, the family incomes of Japanese travelers to the U.S. were dispersed over different income groups with 41% earning under $10,274 per annum and 31% earning over $17,124. The annual family incomes of 23% of the Japanese visitors to the U.S. fell in the $6,850-$10,274 range, and 18% had family incomes of over $23,973 per year. (Data concerning family incomes of previous years are not comparable.)

T A B L E 13

Characteristics of Japanese International Travelers

by Annual Family Income--1975

Annual Family Income (U.S. $)	International Travelers	U.S. Visitors
Up to $6,849	15%	18%
$ 6,850 to $10,274	20	23
$10,275 to $13,699	15	13
$13,700 to $17,123	15	12
$17,124 to $23,973	15	13
Over $23,973	17	18
No Response	3	3
(Base)	(877)	(420)

Japanese travelers to various U.S. destinations reported different annual family incomes. Half (49%) of the visitors to Guam had family incomes of $10,274 per year or less, while visitors to the Eastern U.S. were more up-scale with 24% of the travelers having family incomes of over $23,973.

T A B L E 14

Annual Family Incomes of Japanese Travelers

to U.S. Regions-1975

Annual Family Income (U.S. $)	Guam	Hawaii	U.S. Mainland		
			West	East	Total
Up to $6,849	24%	23%	14%	6%	12%
$ 6,850 to $10,274	25	21	25	21	24
$10,275 to $13,699	4	17	13	21	24

(cont'd)

T A B L E 14 (cont'd)

Annual Family Income (U.S. $)	Guam	Hawaii	U.S. Mainland West	U.S. Mainland East	U.S. Mainland Total
$13,700 to $17,123	11%	12%	10%	16%	12%
$17,124 to $23,973	15	10	16	11	15
Over $23,973	15	15	19	24	21
No response	6	2	3	1	--
(Base)	(97)	(133)	(128)	(62)	(190)

Profiles of Japanese Travelers to U.S. Destinations. Compiling the various destinational distributions concerning the demographic characteristics of Japanese travelers to Guam, Hawaii, and the U.S. Mainland four different traveler profiles can be seen:

Guam: The "typical" Japanese traveler to Guam is female (52%); under 30 years of age (72%); single (59%); high school-education (57%); is a blue-collar worker (53%); and is a member of a family with an annual income of $10,274 or less.

Hawaii: The "typical" Japanese traveler to Hawaii appears to be slightly more up-scale. He is a male (62%; under 30 years of age (56%); married (64%); university-educated (62%); either a director/manager/professional (28%) or a blue-collar worker (37%); and belongs to a family whose annual income is $13,699 or less (61%).

Western U.S.: The "typical" Japanese traveler to the Western sections of the U.S. is male (68%); either young (under 30, 39%) or middle-aged (30 to 49 years, 46%) married (62%); university-educated (73%); employed as either a director/manager/professional (36%) or in a blue-collar position (38%); and is a member of a family whose annual income is under $17,123 (62%).

Eastern U.S.: The most up-scale Japanese traveler to the U.S. is the "typical" visitor to the Eastern U.S. He is a male (85%); middle-aged (30 to 49 years, 71%); married (79%); university-educated (84%); employed as a director/manager/professional (54%); and has a family whose annual income is over $13,700 (51%), with 24% earning over $23,973.

B. Trip Characteristics

This section presents the characteristics of Japanese trips to the U.S. by purpose of trip, mode of transportation, seasonality, length of stay, and trip experience.

Purpose of Trip. According to the most recent available data (U.S.T.S. survey in 1973), Japanese trips to the U.S. are predominantly motivated by "pleasure" reasons. Eighty percent of trips to the total U.S. in 1973 were for these reasons. Business accounted for only 12% of the Japanese trips, and 4% were taken to visit friends and relatives.

These findings closely parallel the results of a 1975 Japan National Tourist Organization report ("Tourism in Japan," 1975) concerning total international travel by Japanese citizens. According to the study, during 1974, 82% of total Japanese trips abroad were for "pleasure" purposes, and 17% were taken for business reasons.

TABLE 15

Characteristics of Japanese International Trips

by Purpose of Trip

Purpose of Trip	Total International Trips (JNTO Survey, 1974 Trips)	Trips to the U.S. (USTS Survey, 1973 Trips)
Pleasure/Vacation	82%	80%
Business	17	12
Visiting friends or relatives	N.A.	4
Other	1	4
(Base)	(2,335,530)	(523)

Japanese travel to the U.S. Mainland, however, reflects a markedly different nature than does travel to all U.S. destinations. While trips to Guam and Hawaii are naturally predominatly pleasure-oriented, trips to the U.S. Mainland include more business travelers than overall U.S. trips.

TABLE 16

Purpose of Japanese Trips

to U.S. Destinations

Purpose of Trip	USTS 1973 Survey			1975 (9th) Mainichi Shimbum Survey
	Guam	Hawaii	U.S. Mainland	U.S. Mainland
"Pleasure"	89%	86%	56%	49%
(Honeymoon)	39	21	4	(n.a.)
(Study)	1	8	20	(n.a.)
Business	7	9	32	47
Visit Friends or Relatives	1	5	12	(n.a.)
Other	3	-	--	4
(Base)	(102)	(333)	(177)	(169)

Mode of Transportation. Air transportation dominates the Japanese travel market to the U.S. Ninety-eight percent of the trips to all U.S. destinations are by air and two percent are by sea (primarily to Guam and Hawaii). During 1973, U.S. carriers accounted for 41% of the Japanese trips to the U.S.; Japanese carriers transported 35%; and airlines of other nations accounted for 24% of the trips.

Seasonality. During 1975, 29% of the Japanese trips to the U.S. occurred during the third quarter of the year, followed by 28% in the first quarter, 23% in the second, and 20% in the fourth quarter. This trip distribution varied somewhat from 1974, when 25% occurred in both the third and fourth quarters.

TABLE 17

Characteristics of Japanese Trips

to the U.S. by Seasonality

1973-1975

Seasonality	Trips to the U.S. 1973	1974	1975 (e)
First Quarter	25%	29%	28%
Second Quarter	21	21	23
Third Quarter	27	25	29
Fourth Quarter	27	25	20
(Base)	(638,330)	(763,215)	(746,124)

Length of Stay. According to USTS analyses of Immigration and Naturalization Forms (I-94) for 1973 Japanese trips to the U.S., the average length of stay in the U.S. was 15.2 days. Business trips tended to be somewhat longer (mean length of stay, 17.1 days) than pleasure trips, due primarily to the greater distances traveled (to the U.S. mainland as opposed to heavy pleasure travel to Guam and Hawaii).

Thirty-five percent of all trips in 1973 had lengths of stay in the U.S. (not including travel time to or from the U.S.) of 0-3 days; 42% of the visits lasted 4-6 days; and 13% lasted from 7-14 days. It should be noted, however, that these figures reflect the high proportion of short-duration trips to Guam and Hawaii. Due to the nature of trips to the U.S. mainland (more business-oriented and longer in distance), Japanese trips to this U.S. destination tend to involve longer lengths of trips (entire travel itinerary, including travel time) than other international trips, including trips to Guam and Hawaii. Seventy-six percent of the trips to the mainland have travel itineraries of from one to three weeks, according to the 1975 (9th) Mainichi, Shimbum survey.

TABLE 18

Characteristics of Japanese International Trips

by Length of Stay/Length of Trip

1973, 1975

Origin	(Base)	Mean Length of Stay,* 1973 Total Trips to U.S. (days)	Business Trips (days)	Pleasure Trips (days)
Japan (total)	(3,492)	15.2	17.1	11.0
Kanto region	(1,570)	17.9	18.2	12.3
Kansai region	(431)	11.9	15.4	9.7

Length of Stay*/ Length of Trip**	International Trips[1] (1975)	Trips to the U.S. Mainland[1] (1975)	Total Trips to U.S.[2] (1973)
0-3 days	3%	2%	35%
4-6 days	39	5	42
7-21 days	46	76	17
Over 21 days	11	16	7
(Base)	(877)	(169)	(3,492)

Note: While these data are not entirely comparable, they do provide some basis for analysis between regions/destinations.

* Does not include transportation time to or from the U.S.
** Entire travel itinerary, including travel time.

[1] Source: 1975 (9th) Mainichi Shimbum survey, reflecting length of trips.

[2] Source: Analysis of 1973 I-94 Forms, reflecting length of stay.

Trip Experience. Although data are not available for 1975, during 1974, 41% of the Japanese trips to the U.S. were taken by first-time overseas travelers. This percentage increased slightly from 1973 when it was 38%, indicating a rise in primary demand in travel to the U.S. First-time travelers were more prevalent among Japanese trips to U.S. destinations than among trips to all international destinations.

T A B L E 19

Characteristics of Japanese International Trips

by Trip Experience

	1973		1974		1975	
	Int'l Trips	Trips to U.S.	Int'l Trips	Trips to U.S.	Int'l Trips	Trips to U.S.
First-time Overseas Travelers	35%	38%	33%	41%	33%	n.a.
Repeat Overseas Travelers	65	62	67	59	67	n.a.
(Base)	(682)	(395)	(664)	(284)	(877)	--

C. Image of the United States

The overall image of the U.S. as a travel destination is favorable. Guam and Hawaii are considered fashionable, tropical resorts with beautiful beaches. Hawaii is increasingly becoming a honeymoon destination for Japanese couples, a popularity traditionally attributable to Guam. Guam's popularity suffered somewhat of a setback during 1975 due to the bad impression caused by Vietnamese refugees stationed there. Currently this problem, however, seems to be diminishing. Hawaii's image remains strong and positive.

The U.S. Mainland is overwhelmingly seen as a destination which would be advantageous to one's business career. The strongest images include large, modern cities and advanced technological achievement. These impressions are evident when considering the composition of the Japanese travel group to the mainland vis-a-vis Guam and Hawaii. Travelers to the U.S. Mainland are more predominantly males, married, highly-educated, employed in white-collar positions, on business trips than are travelers to Guam or Hawaii. The West Coast's image as a "young men's paradise" is also being successfully promoted, according to a July 1975 "Japan Air News" letter.

All U.S. destinations are seen as having an impression of friendliness. The Mainland and Hawaii rank high as places offering enjoyable shopping, and Hawaii is viewed as having the most scenic beauty of all U.S. destinations. All U.S. destinations rank low in having an artistic atomosphere.

Changing Factors. Japanese tourist have faced three major barriers when traveling to the U.S.: (1) language problems; (2) time constraints; and (3) high costs. The language problem has been increasingly negated, by higher proportions of English-speaking visitors to the U.S. Mainland, by the extensive use of the Japanese language in Guam, and by the many tours available. The time problem, too, is of less significance today due to the expansion of vacation time afforded ; to Japanese workers. The final deterrent to travel to the U.S.--cost constraints--has also undergone changes due to packaged tours, and lower inflation rates in the U.S. vis-a-vis Japan.

Overseas travel, in the past few years, has become more feasible in inverse proportion to the continuous rise in Japanese living costs. For example, a solitary vacation in Hawaii in 1965 cost half as much as the then average household expenditure per annum. It had reduced to ten percent of the average household expenditure in 1972.

Japanese tourists are increasingly viewing travel as a necessity, not as a luxury while at the same time, economizing on their travels. There appears to be a diminishing interest in big-name and high-priced cities and on random buying. A leisurely vacation is also an increasingly important demand of Japanese travelers. These trends are especially noticeable among young tourists and family vacationers (a growing market segment).

IV. Market Forecast

During calender year 1976, it is estimated that the United States could receive 858,000 Japanese visitors, a 15% increase over the 1975 figure. Spending by these Japanese tourists could total $485 million, 21% more than the 1975 sum, yielding a per capita spending rate of $565.

ADDENDUM 1

JAPANESE ECONOMIC ENVIRONMENT

	1972	1973	1974	1975 (est)
Population (millions)	107.3	108.7	110.1	111.0
Number of Households (millions)	26.5	28.6	30.5	32.3
Number in Work Force (millions)	51.4	53.0	52.7	51.2
GNP (billions of U.S. $)	$298.1	$409.0	$450.3	$467.6
Per Capita GNP	$2778	$3763	$4090	$4213
Growth Rate in GNP (in real terms)	8.7%	10.2%	-2.0%	1.6%
Inflation Rate	4.5%	11.7%	24.5%	14.0%
Unemployment Rate	1.4%	1.3%	1.4%	2.1%
Number of Unemployed (000)	700	690	740	1,075
Balance of Trade Position (billions of U.S. $)	8.97	3.69	1.63	1.99

ADDENDUM 2

SUMMARY: JAPANESE TRAVELER CHARACTERISTICS

1975

Traveler Characteristic (Base)	Destinations						
			U.S. Mainland				
	Guam (97)	Hawaii (133)	West (128)	East (62)	Total (190)	Total U.S. (420)	Total International (877)
Sex							
Male	48%	62%	68%	85%	74%	64%	74%
Female	52	38	32	15	26	36	26
Age							
Under 30 years	72%	56%	39%	10%	31%	49%	35%
30-39 years	13	20	29	40	33	24	25
40-49 years	8	11	17	31	22	15	23
50 years and over	6	12	15	13	14	12	17
Marital Status							
Married	41%	64%	62%	79%	68%	65%	72%
Single	59	36	38	21	32	35	27
Education							
Primary/Junior High School	5%	7%	5%	3%	4%	5%	5%
Senior High School	57	31	22	13	19	31	33
University	38	62	73	84	77	63	61
Occupation							
Directors/Managers	10%	23%	30%	48%	36%	26%	41%
Professionals	3	5	6	6	6	5	5
Blue-collar workers	53	37	38	26	34	39	30
Self-employed	1	5	4	3	4	4	4
Housewives	14	14	9	10	9	12	7
Other	19	16	13	7	11	14	13

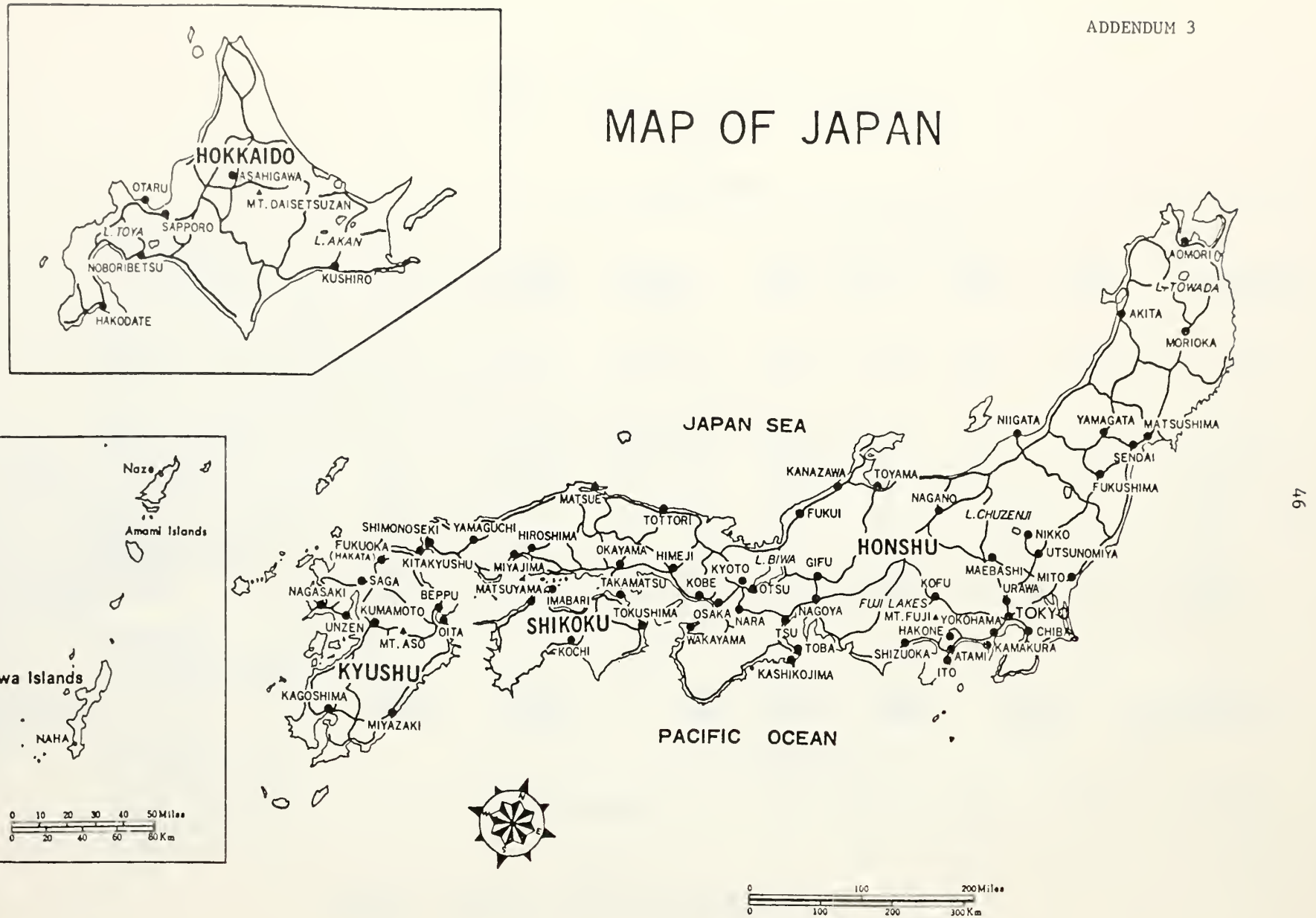
ADDENDUM 2 (Cont'd.)

SUMMARY: JAPANESE TRAVELER CHARACTERISTICS

1975

Traveler Characteristic (Base)	Destinations						
			U.S. Mainland				
	Guam (97)	Hawaii (133)	West (128)	East (62)	Total (190)	Total U.S. (420)	Total International (877)
Annual Family Income							
$Up to $6,849	24%	23%	14%	6%	12%	18%	15%
$6,850 to $10,274	25	21	25	21	24	23	20
$10,275 to $13,699	4	17	13	21	16	13	15
$13,700 to $17,123	11	12	10	16	12	12	15
$17,124 to $23,973	15	10	16	11	15	13	15
Over $23,973	15	15	19	24	21	18	17
No response	6	2	3	1	--	3	3

MAP OF JAPAN


HOKKAIDO
ASAHIGAWA
OTARU
MT. DAISETSUZAN
L. TOYA
SAPPORO
L. AKAN
NOBORIBETSU
KUSHIRO
HAKODATE
Naze
Amami Islands
Okinawa Islands
NAHA
0 10 20 30 40 50 Miles
0 20 40 60 80 Km
JAPAN SEA
AOMORI
L. TOWADA
AKITA
MORIOKA
NIIGATA
YAMAGATA
MATSUSHIMA
SENDAI
FUKUSHIMA
KANAZAWA
TOYAMA
NAGANO
L. CHUZENJI
NIKKO
UTSUNOMIYA
MAEBASHI
MITO
URAWA
TOKYO
CHIBA
KAMAKURA
KOFU
FUJI LAKES
MT. FUJI
YOKOHAMA
HAKONE
ATAMI
ITO
SHIZUOKA
NAGOYA
TSU
TOBA
KASHIKOJIMA
GIFU
FUKUI
MATSUE
TOTTORI
HONSHU
L. BIWA
KYOTO
OTSU
KOBE
OSAKA
NARA
WAKAYAMA
HIMEJI
OKAYAMA
HIROSHIMA
SHIMONOSEKI
YAMAGUCHI
FUKUOKA (HAKATA)
KITAKYUSHU
MIYAJIMA
TAKAMATSU
MATSUYAMA
IMABARI
TOKUSHIMA
SHIKOKU
KOCHI
NAGASAKI
SAGA
BEPPU
KUMAMOTO
UNZEN
OITA
MT. ASO
KYUSHU
KAGOSHIMA
MIYAZAKI
PACIFIC OCEAN
0 100 200 Miles
0 100 200 300 Km

APPENDIX I

STATISTICAL TABLES

ARRIVALS TO THE U. S.

Appendix I

TEMPORARY VISITORS TO U.S. BY COUNTRY OR REGION OF LAST PERMANENT RESIDENCE

JANUARY 1976

COUNTRY	BUSINESS JAN 75	BUSINESS JAN 76	BUSINESS % CHG	PLEASURE JAN 75	PLEASURE JAN 76	PLEASURE % CHG	STUDENTS JAN 75	STUDENTS JAN 76	STUDENTS % CHG	TRANSITS JAN 75	TRANSITS JAN 76	TRANSITS % CHG	TOTAL JAN 75	TOTAL JAN 76	TOTAL % CHG
EUROPE															
AUSTRIA	176	210	19.3	1158	751	- 35.1	21	20	- 4.8	46	26	- 43.5	1401	1007	- 28.1
BELGIUM	667	799	19.8	752	1224	62.8	62	90	45.2	65	70	7.7	1546	2183	41.2
DENMARK	373	420	12.6	815	1131	38.8	26	59	126.9	72	64	- 11.1	1286	1674	30.2
FINLAND	127	134	5.5	456	502	10.1	28	37	32.1	26	32	23.1	637	705	10.7
FRANCE	2343	2580	10.1	5589	8466	51.5	310	349	12.6	355	510	43.7	8597	11905	38.5
GERMANY	2885	3637	26.1	7976	10308	29.2	205	230	12.2	379	445	17.4	11445	14620	27.7
GREECE	206	297	44.2	891	1172	31.5	241	317	31.5	634	524	- 17.4	1972	2310	17.1
ICELAND	35	56	60.0	80	144	80.0	20	24	20.0	5	2	- 60.0	140	226	61.4
IRELAND	274	340	24.1	805	962	19.5	42	81	92.9	50	64	28.0	1171	1447	23.6
ITALY	1409	1816	28.9	3601	5080	41.1	91	165	81.3	824	974	18.2	5925	8035	35.6
LUXEMBOURG	18	17	- 5.6	51	40	- 21.6	8	7	- 12.5	5	1	- 80.0	82	65	- 20.7
NETHERLANDS	970	1359	40.1	1745	2135	22.3	104	114	9.6	284	387	36.3	3103	3995	28.7
NORWAY	401	515	28.4	818	1033	26.3	129	102	- 20.9	509	488	- 4.1	1857	2138	15.1
PORTUGAL	161	120	- 25.5	440	607	38.0	21	20	- 4.8	146	112	- 23.3	768	859	11.8
SPAIN	678	719	6.0	1702	2597	52.6	88	120	36.4	342	292	- 14.6	2810	3728	32.7
SWEDEN	813	1084	33.3	2203	2295	4.2	94	94		183	136	- 25.7	3293	3609	9.6
SWITZERLAND	579	910	57.2	2217	3590	61.9	87	164	88.5	179	74	- 58.7	3062	4738	54.7
USSR	368	138	- 62.5	45	107	137.8	2	16	700.0	45	13	- 71.1	460	274	- 40.4
U. K.	5393	7345	36.2	14968	17379	16.1	343	426	24.2	1815	1738	- 4.2	22519	26888	19.4
YUGOSLAVIA	202	194	- 4.0	658	1080	64.1	11	20	81.8	48	43	- 10.4	919	1337	45.5
OTHER EUROPE	287	308	7.3	1219	1100	- 9.8	13	14	7.7	156	165	5.8	1675	1587	- 5.3
TOTAL	18365	22998	25.2	48189	61703	28.0	1946	2469	26.9	6168	6160	- .1	74668	93330	25.0

Appendix I (Continued)

TEMPORARY VISITORS TO U.S. BY COUNTRY OR REGION OF LAST PERMANENT RESIDENCE

JANUARY 1976

COUNTRY	BUSINESS JAN 75	BUSINESS JAN 76	BUSINESS % CHG	PLEASURE JAN 75	PLEASURE JAN 76	PLEASURE % CHG	STUDENTS JAN 75	STUDENTS JAN 76	STUDENTS % CHG	TRANSITS JAN 75	TRANSITS JAN 76	TRANSITS % CHG	TOTAL JAN 75	TOTAL JAN 76	TOTAL % CHG
SOUTH AMERICA															
ARGENTINA	227	249	9.7	7614	3652	- 52.0	47	62	31.9	79	79		7967	4042	- 49.3
BOLIVIA	65	80	23.1	285	401	40.7	80	68	- 15.0	9	32	255.6	439	581	32.3
BRAZIL	915	996	8.9	8253	12022	45.7	349	554	58.7	218	346	58.7	9735	13918	43.0
CHILE	182	132	- 27.5	1464	1402	- 4.2	109	84	- 22.9	63	51	- 19.0	1818	1669	- 8.2
COLOMBIA	286	435	52.1	2612	3482	33.3	710	729	2.7	247	283	14.6	3855	4929	27.9
ECUADOR	149	151	1.3	1202	1292	7.5	158	222	40.5	48	89	85.4	1557	1754	12.7
PARAGUAY	19	44	131.6	131	141	7.6	9	16	77.8	21	11	- 47.6	180	212	17.8
PERU	94	112	19.1	2562	2884	12.6	314	401	27.7	77	100	29.9	3047	3497	14.8
URUGUAY	40	66	65.0	186	271	45.7	25	26	4.0	46	27	- 41.3	297	390	31.3
VENEZUELA	305	499	63.6	4058	6859	69.0	1427	1597	11.9	118	174	47.5	5908	9129	54.5
OTHER S AMERICA	55	92	67.3	216	289	33.8	71	117	64.8	27	30	11.1	369	528	43.1
TOTAL	2337	2856	22.2	28583	32695	14.4	3299	3876	17.5	953	1222	28.2	35172	40649	15.6
CENTRAL AMERICA															
COSTA RICA	89	77	- 13.5	2173	2186	.6	172	203	18.0	115	57	- 50.4	2549	2523	- 1.0
EL SALVADOR	39	36	- 7.7	1098	1567	42.7	469	389	- 17.1	45	63	40.0	1651	2055	24.5
GUATEMALA	154	249	61.7	1213	1807	49.0	155	203	31.0	43	46	7.0	1565	2305	47.3
HONDURAS	76	109	43.4	1072	1057	- 1.4	364	437	20.1	240	331	37.9	1752	1934	10.4
NICARAGUA	101	118	16.8	915	992	8.4	482	467	- 3.1	98	35	- 64.3	1596	1612	1.0
PANAMA	156	200	28.2	1776	2208	24.3	576	600	4.2	49	75	53.1	2557	3083	20.6
OTHER C AMERICA	74	61	- 17.6	257	285	10.9	81	46	- 43.2	44	35	- 20.5	456	427	- 6.4
TOTAL	689	850	23.4	8504	10102	18.8	2299	2345	2.0	634	642	1.3	12126	13939	15.0

Appendix I (Continued)

TEMPORARY VISITORS TO U.S. BY COUNTRY OR REGION OF LAST PERMANENT RESIDENCE

JANUARY 1976

COUNTRY	BUSINESS JAN 75	BUSINESS JAN 76	BUSINESS % CHG	PLEASURE JAN 75	PLEASURE JAN 76	PLEASURE % CHG	STUDENTS JAN 75	STUDENTS JAN 76	STUDENTS % CHG	TRANSITS JAN 75	TRANSITS JAN 76	TRANSITS % CHG	TOTAL JAN 75	TOTAL JAN 76	TOTAL % CHG
WEST INDIES															
ANTIGUA	30	48	60.0	261	161	- 38.3	21	13	- 38.1	18	12	- 33.3	330	234	- 29.1
BAHAMAS	152	125	- 17.8	4328	4731	9.3	821	682	- 16.9	20	93	365.0	5321	5631	5.8
BARBADOS	30	101	236.7	169	250	47.9	24	21	- 12.5	61	23	- 62.3	284	395	39.1
BERMUDA	65	114	75.4	931	1080	16.0	112	74	- 33.9	158	243	53.8	1266	1511	19.4
BR. VIRGIN ISL	8	22	175.0	118	116	- 1.7	9	6	- 33.3	12	13	8.3	147	157	6.8
DOMINICAN REP.	210	326	55.2	3320	3825	15.2	485	620	27.8	77	89	15.6	4092	4860	18.8
HAITI	148	328	121.6	731	1740	138.0	149	146	- 2.0	167	336	101.2	1195	2550	113.4
JAMAICA	458	525	14.6	2601	3103	19.3	473	534	12.9	151	154	2.0	3683	4316	17.2
NETHERLAND ANTILL	81	123	51.9	490	552	12.7	106	134	26.4	23	38	65.2	700	847	21.0
TRINIDAD & TOBAGO	160	234	46.3	623	705	13.2	155	158	1.9	55	50	- 9.1	993	1147	15.5
OTHER WEST INDIES	86	134	55.8	935	732	- 21.7	111	85	- 23.4	134	98	- 26.9	1266	1049	- 17.1
TOTAL	1428	2080	45.7	14507	16995	17.2	2466	2473	.3	876	1149	31.2	19277	22697	17.7
ASIA															
CHINA MAINLAND	54	31	- 42.6		11	100.0				1	25	2400.0	55	67	21.8
CHINA TAIWAN	259	358	38.2	206	477	131.6	305	261	- 14.4	179	186	3.9	949	1282	35.1
HONG KONG	300	469	56.3	712	1494	109.8	860	1013	17.8	325	387	19.1	2197	3363	53.1
INDIA	287	367	27.9	632	1027	62.5	487	429	- 11.9	79	91	15.2	1485	1914	28.9
INDONESIA	80	130	62.5	110	193	75.5	70	90	28.6	85	95	11.8	345	508	47.2
IRAN	153	305	99.3	448	867	93.5	1122	2554	127.6	2	13	550.0	1725	3739	116.8
ISRAEL	391	1411	260.9	1195	1492	24.9	148	178	20.3	25	24	- 4.0	1759	3105	76.5
JAPAN	6458	6198	- 4.0	53207	52988	- .4	830	1366	64.6	710	355	- 50.0	61205	60907	- .5
KOREA	368	516	40.2	243	331	36.2	109	142	30.3	94	280	197.9	814	1269	55.9
LEBANON	149	163	9.4	154	549	256.5	131	153	16.8		6	100.0	434	871	100.7
MALAYSIA	48	52	8.3	177	106	- 40.1	96	120	25.0	5	13	160.0	326	291	- 10.7
PHILIPPINES	240	432	80.0	583	744	27.6	138	167	21.0	185	413	123.2	1146	1756	53.2
SINGAPORE	79	85	7.6	108	142	31.5	37	33	- 10.8	7	10	42.9	231	270	16.9
THAILAND	51	84	64.7	192	281	46.4	409	283	- 30.8	31	10	- 67.7	683	658	- 3.7
TURKEY	82	105	28.0	172	292	69.8	112	141	25.9	6	7	16.7	372	545	46.5
OTHER ASIA	325	598	84.0	520	844	62.3	588	686	16.7	101	84	- 16.8	1534	2212	44.2
TOTAL	9324	11304	21.2	58659	61838	5.4	5442	7616	39.9	1835	1999	8.9	75260	82757	10.0
OCEANIA															
AUSTRALIA	799	1634	104.5	6016	10762	78.9	115	183	59.1	222	343	54.5	7152	12922	80.7
FIJI	5	5		134	157	17.2	5	2	- 60.0	27	11	- 59.3	171	175	2.3
NEW ZEALAND	152	213	40.1	1589	2253	41.8	32	264	725.0	685	459	- 33.0	2458	3189	29.7
OTHER OCEANIA	12	27	125.0	409	589	44.0	11	21	90.9	39	46	17.9	471	683	45.0
TOTAL	968	1879	94.1	8148	13761	68.9	163	470	188.3	973	859	- 11.7	10252	16969	65.5

Appendix I

TEMPORARY VISITORS TO U.S. BY COUNTRY OR REGION OF LAST PERMANENT RESIDENCE

JANUARY 1976

COUNTRY	BUSINESS JAN 75	BUSINESS JAN 76	BUSINESS % CHG	PLEASURE JAN 75	PLEASURE JAN 76	PLEASURE % CHG	STUDENTS JAN 75	STUDENTS JAN 76	STUDENTS % CHG	TRANSITS JAN 75	TRANSITS JAN 76	TRANSITS % CHG	TOTAL JAN 75	TOTAL JAN 76	TOTAL % CHG
AFRICA															
SOUTH AFRICA	271	412	52.0	624	740	18.6	84	119	41.7	22	23	4.5	1001	1294	29.3
OTHER AFRICA	436	815	86.9	638	904	41.7	1449	2189	51.1	71	93	31.0	2594	4001	54.2
TOTAL	707	1227	73.6	1262	1644	30.3	1533	2308	50.6	93	116	24.7	3595	5295	47.3
OTHER OVERSEAS					2	100.0					1	100.0		3	100.0
TOTAL OVERSEAS	33818	43194	27.7	167852	198740	18.4	17148	21557	25.7	11532	12148	5.3	230350	275639	19.7
MEXICO	1997	2585	29.4	155726	103895	- 33.3	1803	2007	11.3	267	391	46.4	159793	108878	- 31.9
CANADA*													581546	636444	9.4
													971689	1020961	5.1

* DATA ON CANADIAN ARRIVALS BY PURPOSE OF TRIP NOT AVAILABLE.

APPENDIX II

ARRIVALS TO THE U. S.

BY MODE OF TRANSPORT

Appendix II

TEMPORARY VISITORS TO THE U.S. BY COUNTRY OR REGION OF LAST PERMANENT RESIDENCE AND MODE OF TRANSPORT

JANUARY 1976

COUNTRY	AIR			SEA			LAND			TOTAL		
	JAN 75	JAN 76	% CHG	JAN 75	JAN 76	% CHG	JAN 75	JAN 76	% CHG	JAN 75	JAN 76	% CHG
EUROPE												
AUSTRIA	692	952	37.6	40	19	-52.5	669	36	-94.6	1401	1007	-28.1
BELGIUM	1461	2012	37.7	54	121	124.1	31	50	61.3	1546	2183	41.2
DENMARK	1212	1574	29.9	27	33	22.2	47	67	42.6	1286	1674	30.2
FINLAND	601	667	11.0	5	12	140.0	31	26	-16.1	637	705	10.7
FRANCE	7995	10796	35.0	400	458	14.5	202	651	222.3	8597	11905	38.5
GERMANY	9677	12548	29.7	1497	1595	6.5	271	477	76.0	11445	14620	27.7
GREECE	1883	2160	14.7	52	66	26.9	37	84	127.0	1972	2310	17.1
ICELAND	137	225	64.2		1		3		-100.0	140	226	61.4
IRELAND	1143	1385	21.2	10	25	150.0	18	37	105.6	1171	1447	23.6
ITALY	5634	7611	35.1	147	253	72.1	144	171	18.8	5925	8035	35.6
LUXEMBOURG	75	55	-26.7	1	8	700.0	6	2	-66.7	82	65	-20.7
NETHERLANDS	2776	3672	32.3	183	139	-24.0	144	184	27.8	3103	3995	28.7
NORWAY	1596	1979	24.0	189	130	-31.2	72	29	-59.7	1857	2138	15.1
PORTUGAL	723	826	14.2	7	2	-71.4	38	31	-18.4	768	859	11.8
SPAIN	2707	3483	28.7	54	169	213.0	49	76	55.1	2810	3728	32.7
SWEDEN	3100	3408	9.9	59	55	-6.8	134	146	9.0	3293	3609	9.6
SWITZERLAND	2815	4440	57.7	147	157	6.8	100	141	41.0	3062	4738	54.7
USSR	446	272	-39.0				14	2	-85.7	460	274	-40.4
U. K.	19155	24197	26.3	2355	1534	-34.9	1009	1157	14.7	22519	26888	19.4
YUGOSLAVIA	840	1232	46.7	7	10	42.9	72	95	31.9	919	1337	45.5
OTHER EUROPE	1587	1488	-6.2	27	13	-51.9	61	86	41.0	1675	1587	-5.3
TOTAL	66255	84982	28.3	5261	4800	-8.8	3152	3548	12.6	74668	93330	25.0

APPENDIX II (Continued)

TEMPORARY VISITORS TO THE U.S. BY COUNTRY OR REGION OF LAST PERMANENT RESIDENCE AND MODE OF TRANSPORT

JANUARY 1976

COUNTRY	AIR JAN 75	AIR JAN 76	AIR % CHG	SEA JAN 75	SEA JAN 76	SEA % CHG	LAND JAN 75	LAND JAN 76	LAND % CHG	TOTAL JAN 75	TOTAL JAN 76	TOTAL % CHG
SOUTH AMERICA												
ARGENTINA	7256	3836	-47.1	665	135	-79.7	46	71	54.3	7967	4042	-49.3
BOLIVIA	422	569	34.8				17	12	-29.4	439	581	32.3
BRAZIL	9370	13635	45.5	331	251	-24.2	34	32	-5.9	9735	13918	43.0
CHILE	1771	1608	-9.2	23	31	34.8	24	30	25.0	1818	1669	-8.2
COLOMBIA	3687	4578	24.2	138	248	79.7	30	103	243.3	3855	4929	27.9
ECUADOR	1531	1710	11.7	14	4	-71.4	12	40	233.3	1557	1754	12.7
PARAGUAY	171	204	19.3	7	7		2	1	-50.0	180	212	17.8
PERU	2980	3399	14.1	30	27	-10.0	37	71	91.9	3047	3497	14.8
URUGUAY	288	363	26.0	3	1	-66.7	6	26	333.3	297	390	31.3
VENEZUELA	5053	7696	52.3	829	1354	63.3	26	79	203.8	5908	9129	54.5
OTHER S AMERICA	359	497	38.4		1		10	30	200.0	369	528	43.1
TOTAL	32888	38095	15.8	2040	2059	.9	244	495	102.9	35172	40649	15.6
CENTRAL AMERICA												
COSTA RICA	2416	2305	-4.6	36	15	-58.3	97	203	109.3	2549	2523	-1.0
EL SALVADOR	1517	1918	26.4	14	6	-57.1	120	131	9.2	1651	2055	24.5
GUATEMALA	1374	2035	48.1	11	11		180	259	43.9	1565	2305	47.3
HONDURAS	1672	1828	9.3	17	38	123.5	63	68	7.9	1752	1934	10.4
NICARAGUA	1547	1504	-2.8		5		49	103	110.2	1596	1612	1.0
PANAMA	2510	2998	19.4	14	47	235.7	33	38	15.2	2557	3083	20.6
OTHER C AMERICA	427	290	-32.1		102		29	35	20.7	456	427	-6.4
TOTAL	11463	12878	12.3	92	224	143.5	571	837	46.6	12126	13939	15.0

Appendix II (Continued)

TEMPORARY VISITORS TO THE U.S. BY COUNTRY OR REGION OF LAST PERMANENT RESIDENCE AND MODE OF TRANSPORT

JANUARY 1976

COUNTRY	AIR JAN 75	AIR JAN 76	AIR % CHG	SEA JAN 75	SEA JAN 76	SEA % CHG	LAND JAN 75	LAND JAN 76	LAND % CHG	TOTAL JAN 75	TOTAL JAN 76	TOTAL % CHG
WEST INDIES												
ANTIGUA	326	217	-33.4	3	14	366.7	1	3	200.0	330	234	-29.1
BAHAMAS	5233	5561	6.3	77	53	-31.2	11	17	54.5	5321	5631	5.8
BARBADOS	275	376	36.7	3	2	-33.3	6	17	183.3	284	395	39.1
BERMUDA	1256	1493	18.9	6	13	116.7	4	5	25.0	1266	1511	19.4
BR. VIRGIN ISL	115	136	18.3	32	21	-34.4				147	157	6.8
DOMINICAN REPB.	4022	4794	19.2	64	42	-34.4	6	24	300.0	4092	4860	18.8
HAITI	1065	1590	49.3	3	6	100.0	127	954	651.2	1195	2550	113.4
JAMAICA	3602	4206	16.8	32	29	-9.4	49	81	65.3	3683	4316	17.2
NETHERLAND ANTILL	685	836	22.0	7	5	-28.6	8	6	-25.0	700	847	21.0
TRINIDAD & TOBAGO	932	1079	15.8	21	6	-71.4	40	62	55.0	993	1147	15.5
OTHER WEST INDIES	1219	1002	-17.8	33	24	-27.3	14	23	64.3	1266	1049	-17.1
TOTAL	18730	21290	13.7	281	215	-23.5	266	1192	348.1	19277	22697	17.7
ASIA												
CHINA MAINLAND	55	66	20.0					1		55	67	21.8
CHINA TAIWAN	933	1261	35.2	4	1	-75.0	12	20	66.7	949	1282	35.1
HONG KONG	1956	2973	52.0	1	5	400.0	240	385	60.4	2197	3363	53.1
INDIA	1393	1792	28.6	33	49	48.5	59	73	23.7	1485	1914	28.9
INDONESIA	345	498	44.3					10		345	508	47.2
IRAN	1691	3650	115.8	5	5		29	84	189.7	1725	3739	116.8
ISRAEL	1639	3002	83.2	26	13	-50.0	94	90	-4.3	1759	3105	76.5
JAPAN	60944	60609	-.5	13	16	23.1	248	282	13.7	61205	60907	-.5
KOREA	790	1259	59.4	7	3	-57.1	17	7	-58.8	814	1269	55.9
LEBANON	415	850	104.8	10	1	-90.0	9	20	122.2	434	871	100.7
MALAYSIA	293	281	-4.1	9	1	-88.9	24	9	-62.5	326	291	-10.7
PHILIPPINES	1101	1675	52.1				45	81	80.0	1146	1756	53.2
SINGAPORE	210	265	26.2	4		-100.0	17	5	-70.6	231	270	16.9
THAILAND	672	647	-3.7	3	2	-33.3	8	9	12.5	683	658	-3.7
TURKEY	359	476	32.6	9	24	166.7	4	45	1025.0	372	545	46.5
OTHER ASIA	1478	2162	46.3	15	7	-53.3	41	43	4.9	1534	2212	44.2
TOTAL	74274	81466	9.7	139	127	-8.6	847	1164	37.4	75260	82757	10.0
OCEANIA												
AUSTRALIA	6601	11852	79.5	115	417	262.6	436	653	49.8	7152	12922	80.7
FIJI	160	150	-6.3		11		11	14	27.3	171	175	2.3
NEW ZEALAND	2329	3047	30.8	36	35	-2.8	93	107	15.1	2458	3189	29.7
OTHER OCEANIA	467	677	45.0		1		4	5	25.0	471	683	45.0
TOTAL	9557	15726	64.5	151	464	207.3	544	779	43.2	10252	16969	65.5

TEMPORARY VISITORS TO THE U.S. BY COUNTRY OR REGION OF LAST PERMANENT RESIDENCE AND MODE OF TRANSPORT

JANUARY 1976

COUNTRY	AIR			SEA			LAND			TOTAL		
	JAN 75	JAN 76	% CHG	JAN 75	JAN 76	% CHG	JAN 75	JAN 76	% CHG	JAN 75	JAN 76	% CHG
AFRICA												
SOUTH AFRICA	928	1172	26.3	19	62	226.3	54	60	11.1	1001	1294	29.3
OTHER AFRICA	2513	3893	54.9	34	15	-55.9	47	93	97.9	2594	4001	54.2
TOTAL	3441	5065	47.2	53	77	45.3	101	153	51.5	3595	5295	47.3
OTHER OVERSEAS		1			2						3	
TOTAL OVERSEAS	216608	259503	19.8	8017	7968	-.6	5725	8168	42.7	230350	275639	19.7
MEXICO	20020	29205	45.9	2047	1717	-16.1	137726	77956	-43.4	159793	108878	-31.9
CANADA	199 562	2 09 790	5. 1	56	152	171.4	381928	.426502	11.7	581546	636444	9.4
GRAND TOTAL	436190	498498	14.3	10120	9837	-2.8	525379	512626	- 2.4	971689	1020961	5.1

*U.S. GOVERNMENT PRINTING OFFICE: 1976 210-801/217 1-3

PENN STATE UNIVERSITY LIBRARIES
A00007200018 2

Issue Date March 1976